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Turku, 13 July 2015

**Call for tenders on a survey “Alignment of funding for implementation of the European Union Strategy for the Baltic Sea Region”**

Dear Madam/Sir,

The INTERACT Point Turku is opening a call for tenders on a survey: “Alignment of funding for implementation of the European Union Strategy for the Baltic Sea Region”.

Enclosed, please find the terms of reference of this survey.


The deadline for submission of the bids is Friday, 21 August 2015 at 16:00 hrs local time in Finland, by which date and time an electronic version of the bid should be received at the address [ip.turku@interact-eu.net](mailto:ip.turku@interact-eu.net).

A signed hard copy of the bid is requested to be sent by post to: INTERACT Point Turku, P.O.Box 236, ELY Centre, 20101 Turku, Finland.

The successful bidder will be contacted during week 36 (last week of August 2015).

We are looking forward to successful collaboration!

With best regards from INTERACT,



Satu Hietanen  
Coordinator  
INTERACT Point Turku

Enclosed:

- Terms of reference,
- Annex I: Evaluation and selection criteria,
- Annex II: Example list of national and regional funding resources and instruments (excluding EU co-financed programmes),
- ESTEP study ‘Proposals and Recommendations for (A) Integrating the European Strategy for Baltic Sea Region into Programming, Implementation and Financial Support of the EU Structural Funds 2014-2020 and Other Financial Instruments and (B) Improving the EUSBSR Monitoring and Indicators System’, 20 September 2013.



## TERMS OF REFERENCE

### “Alignment of funding for implementation of the European Union Strategy for the Baltic Sea Region”

The EU Programme INTERACT II is part of the European Territorial Cooperation Objective 2007-2013. It is designed to capitalise on the vast pool of experience accumulated through European Territorial Cooperation programmes in the areas of regional development, cross-border cooperation, transnational cooperation and interregional cooperation.

INTERACT Point Turku is part of the decentralised implementation structure of this Programme and provides services to programme bodies and stakeholders in the regions of North-East Europe. Services offered are individual advisory services, training opportunities, management tools, and information services. INTERACT Point Turku delivers these services in close cooperation with the National and Regional Contact Persons (NCPs/RCPs), other INTERACT Points, and cross-border cooperation experts.

Full details regarding the aims, objectives, coordination framework and operational strategy for the Programme can be found in the INTERACT Operational Programme 2007-2013 (OP) available to download at [www.interact-eu.net](http://www.interact-eu.net).

INTERACT Point Turku is hosted by the Finnish Ministry of Employment and the Economy and housed at the Centre for Economic Development, Transport and the Environment for Southwest Finland (hereinafter referred to as ELY Centre) in Turku, Finland.

INTERACT Point Turku has specific knowledge on territorial cooperation in the North East European area, by this covering the area of European Union Strategy for Baltic Sea Region (EUSBSR). In order to facilitate identification and selection of the most relevant solutions to contribute to the EUSBSR implementation INTERACT Point Turku proceeds with two complementary studies. This survey ‘Alignment of funding for implementation of the European Union Strategy for the Baltic Sea Region’ is aiming at collecting information on funding instruments in the Baltic Sea region to support the implementation of the Strategy’s objectives. The survey will provide content for a technical tool (database) further to be developed in cooperation with the EUSBSR stakeholders. The other study ‘Cooperation methods and tools applied by European Structural and Investment (ESI) Funds programmes for 2014-2020 to support implementation of the European Union Strategy for the Baltic Sea Region’ analysed and described examples of cooperation methods and tools applied in the ESI Funds programmes for 2014-2020. Outcome of the latest referred study is available on the EUSBSR website (see [www.balticsea-region.eu](http://www.balticsea-region.eu))

## 2. CONTEXT (rationale)

Eight of the nine states bordering the Baltic Sea are members of the European Union (EU). The introduction of the EU rules, the opportunities created by common policies, such as cohesion policy, the strategy for sustainable development or environmental policy, and the EU funding instruments have opened important new possibilities for a more effective coordination of activities and investments between the countries in the Baltic Sea region, thus delivering higher standards of living for the citizens.

The macro-regional concept arose from willingness for a collective response to environmental deterioration of the Baltic Sea, and for concerted actions to face common challenges. Member States also saw benefit of shared opportunities in the Region. Improvement of transport, communication and energy networks and development of innovation and competitiveness capacity can be mentioned as examples of this. This resulted in the adoption of the first EU macro-regional strategy in 2009. The



Action Plan accompanying the EUSBSR<sup>1</sup> explicitly describes the common challenges and opportunities of the Baltic Sea region and presents actions to be taken.

The EUSBSR is based on three principles, where one is 'no new funding'. Therefore various funding resources supporting public and private investments should be aligned to implement the EUSBSR objectives. It is misleading to assume that only EU co-financed programmes are relevant in this respect. List of funds relevant to be applied for the EUSBSR implementation varies from the EU co-financed programmes to the ones provided exclusively by national/regional budgets or private resources.

Commonly used policy implementation instruments at national and regional levels can be allocated to support the EUSBSR. The intention of the EUSBSR is to align utilisation of these funding resources to commonly agreed policy priorities as listed in the Action Plan accompanying the EUSBSR. Until now the opportunities of alignment of the existing funding resources have not been fully exploited.

Probably it is due to lack of sufficient understanding of links between objectives at the level of the country or the region and those at macro-regional level by implementing bodies. The benefits of better convergence and coordination of the respective efforts with neighbouring countries in order to address more efficiently common issues or benefit better from shared opportunities in the macro-region are not clearly perceived.

The study 'Analysis of needs for financial instruments in the EU Strategy for the Baltic Sea Region'<sup>2</sup>, carried out by SWECO in October 2011 concluded that an obstacle to the EUSBSR implementation is not due to a lack of financial means. It is more related to insufficient awareness about what funding resources are available in general. It was also stated that knowledge about application procedures to access and mobilize funding resources was low. It was concluded by the authors of the SWECO study that:

- more proactive stimulation and coordination are needed, including clear incentives for those implementing the Strategy, and
- Member States need to make more resources available, both in terms of coordination support and policy funding, for the EUSBSR implementation.

Experiences on the ground also shows that another obstacle to support the EUSBSR implementation by using other funds than the European Territorial Cooperation (ETC)/Interreg programmes and limited exploitation of cooperation possibilities under other instruments currently used at national/regional/local level are largely grounded on lack of awareness. Until now macro-regional project owners are spontaneously searching for funding capacity among ETC/Interreg programmes as the 'usual financial resources for cooperation.

In fact, there are obvious restrictions in applying for ETC/Interreg programme funding. Those are focusing to local needs in the cross-border areas and have limited financial resources: e.g. while budgetary allocation for all programmes under 'European Territorial Cooperation' is only 2,75% out of total allocations, the programmes under 'Investment for Growth and Jobs' count for 96,33% of total budgetary allocations for ESI Funds 2014-2020. In addition possibilities to implement investment projects of macro-regional relevance are also limited by the specific joint management requirements for ETC/Interreg programmes.

Already in 2011, Commissioner Johannes Hahn, (at that time Commissioner in charge of European Cohesion Policy) in his letter to the Prime Ministers of the Member States in the Baltic Sea region<sup>3</sup> stressed that "implementation of the Strategy should be understood as an horizontal issue, cutting across many different ministries, with the involvement of all relevant national and regional experts" Commissioner Johannes Hahn highlighted that "great results from the Strategy cannot be expected if we confine the implementation of the Strategy to territorial cooperation funds. Only if the needs

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<sup>1</sup> [http://ec.europa.eu/regional\\_policy/cooperate/baltic/documents\\_en.cfm#1](http://ec.europa.eu/regional_policy/cooperate/baltic/documents_en.cfm#1)

<sup>2</sup> Analysis available on [http://www.interact-](http://www.interact-eu.net/news/downloads_4519_analysis_of_needs_for_financial_instruments_in_the_eusbsr_sweco_07_10_2011/7/10595)

[eu.net/news/downloads\\_4519\\_analysis\\_of\\_needs\\_for\\_financial\\_instruments\\_in\\_the\\_eusbsr\\_sweco\\_07\\_10\\_2011/7/10595](http://www.interact-eu.net/news/downloads_4519_analysis_of_needs_for_financial_instruments_in_the_eusbsr_sweco_07_10_2011/7/10595)

<sup>3</sup> Commissioner Hahn's letter to the Prime Ministers, ARES (2011)1206552 of 11 November 2011



identified in the Action Plan - which was widely consulted and agreed upon in the Region are linked to all available Funds, will the Strategy succeed”<sup>4</sup>.

To allow and encourage the development, funding and implementation of cooperation activities and projects, the set of the EU regulatory framework for the ESI Funds for 2014-2020<sup>5</sup> has opened-up the possibilities to establish financial and operational tools to stimulate and facilitate synergies between various funding instruments, not only within the EU but also with EU neighbouring countries.

Background information on possible cooperation models (convergent, complementary, coordinated and joint models) for implementing cooperation goals in the framework of the EUSBSR can be found in the study prepared by ESTEP ‘Proposals and Recommendations for (A) Integrating the European Strategy for Baltic Sea Region into Programming, Implementation and Financial Support of the EU Structural Funds 2014-2020 and Other Financial Instruments and (B) Improving the EUSBSR Monitoring and Indicators System’ of 20 September 2013. The document is attached to these Terms of Reference. The ESTEP study highlights that financial support to cooperation activities is not restricted, as it is presently usually observed, to the ETC/Interreg programmes. It can also be very extensively performed under other EU, national or regional funds and policy implementation instruments. It is also concluded that often other instruments than ETC/Interreg programmes can offer more flexibility in their selection procedures and management rules. In addition their financial allocations are much more important.

Thus, considering above mentioned, **this service is expected to establish inventory and collect descriptive data on funding resources not limited to ETC/Interreg programmes or ESI Funds programmes for 2014-2020. It should neither be limited to other EU co-financed funding resources and European sectorial policy implementation instruments.**

Therefore, novelty of this survey is, in addition to up-dating information on ESI Funds and other EU co-funding resources, to collect information about non-EU funded sources existing in the countries of the Baltic Sea region for sectorial and territorial policy implementation. These funding resources are existing at national and regional levels being public or private funds. A list of lately mentioned funding resources in specific sectors in Estonia, Poland and Sweden is drafted and attached to these Terms of Reference as **Annex II**. The list is not exhaustive and is aiming to illustrate variety of funding sources available at national and regional levels in various countries. Selected service provider is expected to expand the list and its analysis of these founding sources and policy implementation instruments also to other Baltic Sea region countries.

### 3. MAIN TASKS

The overall objective of this survey is **establish inventory on funding resources and implementation instruments available in the Baltic Sea region countries that can be used to achieving the EUSBSR objectives. The inventory should compile specific characteristics of these funding sources/policy implementation instruments. The compiled data will be serving needs of the EUSBSR stakeholders.**

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<sup>4</sup> Ibid

<sup>5</sup> The guiding principles for the alignment of funding sources are dictated by the EU regulatory framework and the EUSBSR relevant Council Conclusions and reports, such as:

- Regulation (EU) No 1303/2013 of 17 December 2013; European Structural and Investment Funds specific -Council Conclusions on the review of the European Union Strategy for the Baltic Sea Region, General Affairs Council meeting, 15 November 2011
- Council Conclusions on added value of macro-regional strategies, General Affairs Council meeting, 22 October 2013
- Communication concerning the European Union Strategy for the Baltic Sea Region, COM (2012) 128 final adopted on 23 March 2012.
- Report from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions concerning the added value of macro regional strategies, COM(2013) 468 final of 27 June 2013.



Currently, the EUSBSR website displays tables of funding resources available for 2007-2013 programming period<sup>6</sup>. They cover mainly EU Structural Funds programmes implemented under Objectives 1 and 2 (Convergence, Competitiveness and Regional Employment), Objective 3 (Territorial Cooperation) and European Neighbourhood and Partnership Instrument Programmes for 2007-2013. Lastly some other funding resources are included. The list does not cover other purely national or regional funding capacity. It is neither sufficiently detailed.

In order to provide relevant information to decision-makers, managing authorities, other programme bodies, project developers and another stakeholders participating to the implementation of the EUSBSR, contractor is expected to:

- 1) Collect a comprehensive list of funding resources/policy implementation instruments available in the Baltic Sea region with useful descriptive data.
- 2) Identify the most important needs for accessing the relevant information by the different categories of users, format and present the collected data in easy, comprehensive and well-structured way.

Main tasks are further described as follows:

**Task One: Provide a comprehensive list and collect respective data on funding sources/policy implementation instruments available in the Baltic Sea region**

These funding sources and policy implementation instruments:

- 1) are managed by public, private institutions or foundations, entirely supported by national or regional budget, or co-financed by EU, pan-Baltic and other institutions;
- 2) provide support to the EUSBSR implementation (it would contribute to the Strategy's objectives, policy areas and/or horizontal actions). Support can be ensured through concerted processes and measures (e.g. for projects like, reducing nutrients flows in the Baltic Sea, improving transport infrastructure and services, enhancing cooperation in R&D of innovation capacity can be mentioned) and implementation of convergent, complementary, coordinated or joint projects (See ESTEP Study<sup>7</sup>);
- 3) identify if partners from Baltic Sea region countries and other Baltic Sea region states - Norway, Russia and Belarus, are eligible for funding.

In particular, the Contractor is requested:

a) Identify and list the different possible funding resources, such as:

- ESI Funds national and regional programmes for 2014-2020, covering European Regional Development Fund (ERDF), European Social Fund (ESF), European Agricultural Fund for Rural Development (EAFRD) and European Maritime and Fisheries Fund (EMFF);
- EU co-financed programmes, like HORIZON 2020, BONUS, COSME, LIFE, etc.;
- ETC/Interreg programmes;
- cooperation programmes under European Neighbourhood Instrument (ENI);
- seed money facilities for the preparation of cooperation projects in the Baltic Sea region;

<sup>6</sup> A first attempt to collect basic information on the different funding sources available in the Region for 2007-2013 was made in 2010 and the result t can be found on <http://www.balticsea-region-strategy.eu/>.

<sup>7</sup> ESTEP study 'Proposals and Recommendations for (A) Integrating the European Strategy for Baltic Sea Region into Programming, Implementation and Financial Support of the EU Structural Funds 2014-2020 and Other Financial Instruments and (B) Improving the EUSBSR Monitoring and Indicators System' of 20 September 2013



- national and/or regional funding sources and policy implementation instruments, like those listed as examples in Poland, Estonia and Sweden (see Annex II to these Terms of Reference);
- pan-Baltic funds, programmes or instruments (public or private), like John Nurminen Foundation, etc.;
- other funding sources, if found relevant.

b) Prepare and present to INTERACT Point Turku and a steering committee a template for inventory.

The inventory should present following data for each funding source:

- title/name of a funding resource/policy implementation instrument;
- description of the respective mission (objective) of a funding resource/ policy implementation instrument;
- area and subject of intervention (sector, priorities, nature of actions or investment);
- link to the EUSBSR Action Plan (at the EUSBSR objective, policy area or horizontal action level) in order to specify the sectorial coverage and eligibility requirements;
- potential beneficiaries; indicating whether partners from Baltic Sea region countries and other Baltic Sea region states - Norway, Russia and Belarus could be eligible for funding and under what conditions;
- budgetary allocation and financial support modalities (total financial envelope, territorial and sectorial eligibility restrictions, types of financial support (grant, loan, other));
- eligible territory of the investment (geographical coverage): country, region (NUTS II), area (under NUTS II level);
- application submission procedure (at general level, e.g. identifying if the funding resource foresees periodically organised calls or permanent open desk for submission of projects);
- period(s) and deadlines for submission of applications (if more deadlines are known per fund, to identify those);
- corresponding keywords for facilitating the search for information;
- link of the funding source for obtaining more information and contact details.

In case the Contractor identifies other data that might be of value for the EUSBSR stakeholders, it should be added to the list above.

c) Collect from the European Commission services and from the relevant administrations and public /private institutions in member states and regions necessary data concerning funding sources/policy implementation instruments.

When implementing Task One, the Contractor shall organize the work in order to be able to concentrate the efforts on collecting descriptive data on other than EU co-financed funding sources.

The information on the EU co-financed programmes/funds can be requested from the European Commission services. INTERACT Point Turku will support Contractor by addressing the European Commission services. During the work, the degree of preparation and adoption of the funds/ programmes /policy implementation instruments should be considered. The Contractor is requested to complete the information on existing funding sources and implementation instruments as soon as they are adopted.



The Contractor should consider the need for regular updates of the inventory. It is expected that Contractor will identify data that need to be updated regularly (once or twice a year) and will estimate the cost for this update until 2022.

**Task Two: Identify the most important needs for accessing the relevant information by the different categories of users; format and present the collected data in easy, comprehensive and well-structured way.**

The Contractor is expected to identify the most important needs for the different categories of inventory users listed below. The targeted groups of the inventory users are:

- owner of the technical tool (database);
- funders, decision makers, owners or managers of various funding resources: programme managing bodies (managing authorities, implementing bodies, Joint Secretariats, others);
- the EUSBSR 'brokers' - policy area coordinators, horizontal action coordinators, institutions advising and promoting initiatives to implement the EUSBSR;
- applicants - individuals and public or private bodies and organisations searching for funding possibilities.

Based on the identified needs for different categories of users, templates for presenting requested descriptive data (information on funding resources/policy implementation instruments) should be provided. The Contractor is expected to present content of the inventory in an easy, comprehensive and well-structured way. It should guide various user groups in identifying the most relevant funding resources/policy implementation instruments.

It is expected that relevant presentation templates would be developed (e.g. multiple entry tables) facilitating access and understanding of the descriptive data. The information will be structured in order to give an easy access by eligible geographical area and by eligible sector of activity in relation to the policy areas and horizontal actions of the EUSBSR.

It should be noted that a technical tool (database) will be developed in parallel with implementing this survey, thus close coordination between both processes will need to be ensured. A dialogue with the Contractor on how the relevant respective data on funding sources/policy implementation instruments available in the Baltic Sea region could be presented in a technical tool (database) will be ensured. The Contractor need to foresee at least one meeting between INTERACT Point Turku, the Contractor, owner and developer of a technical tool (database).

#### **4. DURATION AND DELIVERABLES**

The mission will be executed within 15 weeks starting from the signature of the service contract.

For implementation and monitoring of the progress of the survey a steering committee will be established by INTERACT Point Turku. This service will require meetings between INTERACT Point Turku, the steering committee and the Contractor:

0. Kick-off meeting with the steering committee for this contract: Week 37, September 2015

Discussion of the objectives of the survey, verification of the good understanding of the different tasks and their objectives presentation and discussion on the envisaged working methods, expected results and deliverables at the different stages of the survey.

1. Inception/methodological report: Week 38, September 2015



Presentation by the Contractor and agreement with the steering committee on the details of the envisaged working plan, methods and tools, content of the intermediate and final reports, ideas for presenting the collected data. Discussion of the needs for clarification and more precision and possible difficulties and solutions

2. 1<sup>st</sup> Interim Report on progress in implementing Task One: Week 43, October 2015

Presentation by the Contractor to the steering committee of the 1<sup>st</sup> Interim Report on the progress made and results achieved in identifying the funding sources/implementing instruments, in particular other than EU co-financed funding sources, and in the collection of the requested information; validation of intermediate results by the steering committee and review of possible difficulties and identification and agreement on solutions.

3. 2<sup>nd</sup> Interim Report on progress in implementing Task Two: Week 47, November 2015

Presentation by the Contractor to the steering committee of the 2<sup>nd</sup> Interim Report on the progress made and results achieved in identifying the needs of the main categories of users; present data collected under Task One in accordance with users' needs; validation of intermediate results by the steering committee and review of possible difficulties and identification and agreement on solutions.

4. Draft Final Report: Week 49, November 2015

Presentation by the Contractor to the steering committee of the draft Final Report with results achieved in collecting, elaborating and presenting the requested information corresponding to Tasks One to Two; validation of final results by the steering committee and review of possible difficulties and identification and agreement on solutions and expected adjustments.

The Contractor is expected to identify in the draft Final Report the data that need to be up-dated regularly and to estimate the cost for the update until 2022.

5. Final Report and related documentation: Week 51, December 2015

Presentation by the Contractor to the steering committee of the Final Report presenting the results of the survey accordingly to the adjustments concerning the content, the presentation and the recommendations as agreed in the previous stages in view of obtaining the official validation of the Final Report.

Each of the Reports would be presented by the Contractor to the steering committee in a meeting (in Turku or Helsinki). The Reports will be submitted to the INTERACT Point Turku and steering committee members at least 5 working days prior the agreed meeting. If relevant, INTERACT Point Turku will invite to the meetings other external experts, prior informing on it the Contractor.

## 5. SELECTION CRITERIA

In addition to the usual selection criteria (legal position, economic and financial capacity), criteria applied for assessing the technical and professional capacity will include:

- Knowledge of the different pan-Baltic, national and regional, public and private funding resources and policy implementation instruments operating at territorial and sectorial levels in each Member State in the Baltic Sea region. Additional knowledge on funding resources in Belarus, Norway and Russia is an asset.
- Knowledge of administrative management systems supporting the implementation of policy implementation instruments in each Member State of the Baltic Sea region.
- Knowledge of the financial instruments of the European policies.
- Knowledge of the EUSBSR, its objectives, policy areas and horizontal actions.





For further information, please refer to evaluation and selection criteria grid in Annex I to these Terms of Reference.

## 6. SUBMISSION OF PROPOSALS

INTERACT Point Turku will be responsible for the identification of potential contributors to the survey and for initiating, coordinating and controlling the service. The selection and identification of the winning bidder will be done according to selection criteria referring to the experience and networking capacity of the applicant in relation to the nature and content of the works to be done and the description and quality of the proposal.

Eligible institutions and individuals interested in tendering should provide a brief outline of the approach they would adopt, covering the following general headings:

1. Understanding and interpretation of the Terms of Reference and the tasks to be performed.
2. Description of the organisation proposed to deliver the requested services.
3. Relevance of staff members' knowledge and demonstration of their experience for delivering the requested service (including individual curriculum).
4. Description of staff members' capacity to access to the relevant information sources in the respective countries/regions and their networking capacity.
5. Description of the approach, methodology and tools to be used.
6. Informative description of the outputs to be delivered.
7. Timetable of activities.
8. Budget, including all total costs related to detailed budget lines of the survey.

The following timetable and list of milestones are provided as an indicative framework for conducting the service. It is hoped that the milestones can be respected whilst some room for negotiations is expected. The timetable will ensure that the service is completed on schedule and serve as a vital source of information for the implementation of the INTERACT Programme as well as for the provision of information to the European Commission and the Member States.

Submission of bids	21 August 2015
Award of contract	By Week 37, September 2015
Kick-off meeting	Week 37, September 2015
Inception/ methodological report	Week 38, September 2015
Delivery of 1 <sup>st</sup> Interim report on Task One	Week 43, October 2015
Delivery of 2 <sup>nd</sup> Interim Report on Task Two	Week 47, November 2015
Draft Final Report	Week 49, November 2015
Submission of Final Report and related documentation	Week 51, December 2015

The planned meetings are intended to introduce the appointed team into their duties and to monitor, discuss and evaluate the interim and final results. The service will require at least two meetings between INTERACT Point Turku, steering committee and the Contractor. Meeting dates and venues will be agreed at the later stage.



The total budget available for the survey is EUR 70 000 including all costs (person hours, travel and accommodation and subsistence for working meetings, VAT, etc).

Any queries relating to this document should be directed to:

INTERACT Point Turku

Itsenäisyydenaukio 2 | ELY Centre | P.O.Box 236

20101 Turku

Finland

[www.interact-eu.net](http://www.interact-eu.net)

Contact persons for this Call for Tender are Satu Hietanen and Baiba Liepa ([firstname.lastname@interact-eu.net](mailto:firstname.lastname@interact-eu.net)) at INTERACT Point Turku.

Due to summer vacation period queries will be responded after 10 August 2015.



ANNEX I

EVALUATION AND SELECTION CRITERIA

“Alignment of funding for implementation of the European Union Strategy for the Baltic Sea Region”

The following grid will be used to assess bids received within this Call for Tenders. Each proposal will be considered in accordance to the following weighted criteria:

Criteria - Bidder	Weighting of Criteria (percent) 60
<b>1. Profile of the Applicant and networking capacity</b>	<b>30</b>
1.1. Management Structure	5
1.2. Capacity to access the relevant public and private information sources on sectorial policy funding sources and implementation instruments in each country at national and when relevant at regional level; Capacity to be demonstrated and specified for each country in the Baltic Sea region	10
1.3. Capacity to cover the multi-lingual needs for the service (to specify language coverage)	5
1.4. Expertise of the Applicant team in collecting and presenting data	5
1.5. Knowledge of the Applicant on the EUSBSR objectives and Action Plan	5
<b>2. Background and professional experience of the respective members of the working team</b>	<b>30</b>
2.1. Knowledge of other than EU co-financed funding sources and policy implementation instruments at national and regional and international level in the Baltic Sea region countries (to be specified by country )	20
2.2. Knowledge of EU co-financed resources and policy implementation instruments at national, and regional level when relevant in the different countries in the Baltic Sea region (to be specified by country)	10
Criteria - Content of the proposal	Weighting of Criteria (percent) 40



<b>1. Content</b>	<b>35</b>
1.1. Understanding and interpretation of the Terms of Reference	10
1.2. Relevance and quality of the proposed approach and working methods	10
1.3. Relevance of the proposed timetable of activities	5
1.4. Relevance and quality of proposals on the outputs to deliver and present	10
<b>2. Finance</b>	<b>5</b>
2.1. Envisaged budget, including all costs (including travel costs and VAT) as specified in the Terms of Reference	5



ANNEX II

EXAMPLE LIST OF NATIONAL AND REGIONAL FUNDING RESOURCES AND INSTRUMENTS (excluding EU co-financed programmes)

Country	Funding source/Instrument	Short description	Link
Estonia	Environmental Investment centre (KIK) Environmental programme (with subprogrammes)	Based on revenues from environmental taxes and charges; implemented on the basis of sub-programmes (e.g. water management, waste management, marine environment, forest, nature conservation, atmospheric air, etc.) > possibility to contribute to the environment- and energy-related objectives of the Strategy	<a href="http://kik.ee/en">http://kik.ee/en</a> <a href="http://kik.ee/en/kik/sources-financing">http://kik.ee/en/kik/sources-financing</a>
	Instruments managed by Kredex	Kredex manages both grant and loan measures/instruments oriented at technology development at enterprises; energy efficiency; etc.	<a href="http://kredex.ee/en/energy-efficiency/">http://kredex.ee/en/energy-efficiency/</a>
	Use of Greenhouse Gases emission quota trading revenues	Different measures oriented at promotion of energy efficiency; energy of renewable sources; sustainable transport, managed mainly by either Environmental Investment Centre (KIK) or Kredex; some of these measures are combined with the use of 2014-2020 EU Structural Funds	<a href="http://kik.ee/en/green-investment-scheme">http://kik.ee/en/green-investment-scheme</a> <a href="http://www.kredex.ee">www.kredex.ee</a>
	Grants of Estonian Research Council (ETAG)	In addition to different measures funded under EU instruments, grants financed from internal sources are also provided to researchers	<a href="http://www.etag.ee/en/research-funding/">http://www.etag.ee/en/research-funding/</a>
	Loans and guarantees of Rural Development Foundation (MES)	In addition to financial instruments under EAFRD, Rural Development Foundation manages other loan and guarantee instruments, primarily for rural development and agriculture related purposes	<a href="http://mes.ee/en">http://mes.ee/en</a>
	Enterprise Estonia (EAS)	In addition to measures financed under ERDF and ESF, Enterprise Estonia provides some other instruments to entrepreneurs as well as public and non-profit sector	<a href="http://www.eas.ee/en">http://www.eas.ee/en</a>
Poland	National Centre for Research and Development (Narodowe Centrum Badań i Rozwoju)	Supports commercialization and other forms of transfer of scientific research results, management of applied research programmes, implementing international scientific mobility programs (emphasis on research programmes for young scientists). Implementing agency of the Minister of Science and Higher Education.	<a href="http://www.ncbr.gov.pl/en/">http://www.ncbr.gov.pl/en/</a>
	National Science Centre (Narodowe Centrum Nauki)	Government agency, supervised by the Ministry of Science and Higher Education. Supports basic research in Poland (experimental or theoretical endeavours). Budget: over € 200M a year. The Centre finances projects in Arts, Humanities and Social Sciences, Life Sciences, Physical Sciences and Engineering. One of its goals is inspiring international cooperation in basic research.	<a href="https://www.ncn.gov.pl/?language=en">https://www.ncn.gov.pl/?language=en</a>



	Polish Academy of Science (Polska Akademia Nauki)	State scientific institution. The Academy as a research centre has 79 research entities (i. a. institutes and research centres, research stations, botanical gardens) and auxiliary scientific units (archives, libraries, museums, and foreign stations). The research activity of the Academy is financed mainly from the state budget via the Ministry of Science and Higher Education.	<a href="http://www.english.pan.pl/">http://www.english.pan.pl/</a>
	Funds of Ministry of Culture and National Heritage	Funds for promotion of culture.	<a href="http://www.mkidn.gov.pl/">http://www.mkidn.gov.pl/</a>
	National Fund for Environmental Protection and Water Management (Narodowy Fundusz Ochrony Środowiska i Gospodarki Wodnej) and Regional Funds for Environmental Protection and Water Management	National Fund for Environmental Protection and Water Management along with 16 regional funds are the main pillars in Polish system of financing environmental protection. Priorities: protection and sustainable management of water resources; rational waste management and protection of soil surface; protection of the air; protection of biodiversity and ecosystem services.	<a href="http://www.nfosigw.gov.pl/en/">http://www.nfosigw.gov.pl/en/</a>
	Long-term programme for seashore protection for the years 2004 - 2023	Long - term government programme (state budget funding)	
	Tourism development programme till 2020	Long -term government programme (state budget funding)	
	Ministry of Sports and Tourism own resources		<a href="http://en.msport.gov.pl/">http://en.msport.gov.pl/</a>
	Polish Tourist Organization (Polska Organizacja Turystyczna), Regional Tourist Organizations	Government institution supervised by the Minister of Sport and Tourism. Its main goal is the promotion of touristic attractiveness of Poland and development of tourism.	<a href="http://www.pot.gov.pl/">http://www.pot.gov.pl/</a>
	Polish Agency for Tourism Development (Polska Agencja Rozwoju Turystyki)	Company focusing on developing tourism on the local level with the idea that tourism is one of the factors facilitating growth in the regions.	<a href="http://www.part.com.pl/">http://www.part.com.pl/</a>
	Civic Initiatives Fund (Fundusz Inicjatyw Obywatelskich)	Governmental long-term programme, supervised by the Minister of Social Policy. The Fund is a grant program addressing non-for-profit organizations, formed for the purpose of initiating and strengthening civic initiatives, in cooperation with NGOs.	<a href="http://www.pozytek.gov.pl/What,is,FIO,581.html">http://www.pozytek.gov.pl/What,is,FIO,581.html</a>
	Polish Agency for Enterprise Development (Polska Agencja Rozwoju Przedsiębiorczości)	Government agency providing support to entrepreneurs in the implementation of competitive and innovative projects. Its main goal is to develop the sector of small and medium-sized enterprises in Poland.	<a href="http://en.parp.gov.pl">http://en.parp.gov.pl</a>
Sweden <sup>8</sup>	Swedish Institute	Swedish Institute actively supports regional development in the Baltic Sea Region in different ways and in areas of Environment, Health, Democracy, Security and Business.	<a href="https://si.se/verksamhetsomraden/ostersjosamarbete/">https://si.se/verksamhetsomraden/ostersjosamarbete/</a>

<sup>8</sup> For more details on any of the funds listed as operated in Sweden, please see attached letter prepared by Swedish Agency for Economic and Regional Growth, Tillväxtverket (in Swedish) as of 18 February 2015



		The Swedish Institute provides project funding to Swedish state organisations and agencies, including universities and colleges, municipalities, regional councils and county councils, as well as business trade organisations and non-governmental organisations. The aim is to develop and strengthen Swedish relations and cooperation in the Baltic Sea region.	
Swedish Agency for Economic and Regional Growth, Tillväxtverket		Tillväxtverket is managing various EU funds and programmes.	<a href="http://www.tillvaxtverket.se">www.tillvaxtverket.se</a> <a href="http://eu.tillvaxtverket.se/">http://eu.tillvaxtverket.se/</a>
Swedish International Development Cooperation Agency, Sida		Sida funds Swedish actors operating in Northwest Russia and Belarus. Funding is available in areas like human rights, democracy and environment.	<a href="http://www.sida.se/English/">http://www.sida.se/English/</a>
Swedish Cleantech		The purpose of Swedish Cleantech is to contribute to the development, commercialisation and export of Swedish environmental technology. Official business-to-business platform for Swedish companies and part of the Government's environmental technology strategy. The website is operated and developed by the Swedish Agency for Economic and Regional Growth, Tillväxtverket, in cooperation with the authorities, industry and stakeholder associations, as well as regional environmental technology actors. It provides info on partners and funding possibilities in respective sectors.	<a href="http://swedishcleantech.se/">http://swedishcleantech.se/</a>
Swedish Innovation Agency, VINNOVA		VINNOVA is promoting sustainable growth by improving the conditions for innovation, as well as funding needs-driven research. VINNOVA has the national responsibility for providing information and advice on Horizon 2020. The agency is also the National Co-ordinator (NCC) for COST, is the Swedish co-ordinator for both EUREKA and Eurostars and runs the national EUREKA office. It is providing funding support for projects within research and innovation program BONUS.	<a href="http://www.vinnova.se/">http://www.vinnova.se/</a>
Swedish Energy Agency (Energimyndigheten)		The Agency has allocated funding for the Swedish participation in European cooperation in the ERA-NET COFUND Smart Cities and Communities.	<a href="https://www.energimyndigheten.se/">https://www.energimyndigheten.se/</a>
Svensk Exportkredit - SEK		SEK's mission is to secure access to funding for Swedish export industry. SEK vision is to strengthen competitiveness of Swedish companies and thereby contribute to job creation and sustainable growth in Sweden.	<a href="http://www.sek.se/">http://www.sek.se/</a>
Exportkreditnämnden - EKN		The mission of EKN is to promote export and internationalization of Swedish companies.	<a href="http://www.ekn.se/">http://www.ekn.se/</a>
ALMI		Almi offers various forms of export financing for companies.	<a href="http://www.almi.se">http://www.almi.se</a>



	<p>Nordic Project Fund - Norden - Nopef</p>	<p>Nopef funds studies related to environment, climate change and green growth. Feasibility studies may contribute directly/indirectly environmental impacts and increased environmental awareness in the project countries. Nopef also finances feasibility studies for small and medium-sized enterprises for developing entrepreneurship in a country or outside the EU and EFTA.</p>	<p><a href="http://www.nopef.com/">http://www.nopef.com/</a></p>
	<p>Nordic Environment Finance Corporation - NEFCO</p>	<p>NEFCO provides loans and makes capital investments in order to generate positive environmental effects in the region.  To date, NEFCO has financed a wide range of environmental projects in Central and Eastern European countries, including Russia, Belarus and Ukraine.</p>	<p><a href="http://www.nefco.org">www.nefco.org</a></p>
	<p>Industrifonden (Industrial Development Fund)</p>	<p>Industrifonden can invest in the form of equity and various types of risk-sharing loans, e.g., options and convertibles. The fund invest in companies in many sectors such as IT, telecom, Internet/media, electronics, life sciences, industry, energy and environmental technology</p>	<p><a href="http://www.industrifonden.se/">http://www.industrifonden.se/</a></p>
	<p>Swedfund</p>	<p>Swedfund provides venture capital to entrepreneurs. Swedfund's role is to finance sustainable business in some of the world's poorest countries.</p>	<p><a href="http://www.swedfund.se/sv/">http://www.swedfund.se/sv/</a></p>
	<p>Regional development funds (funds 1: 1) Regionala utvecklingsmedel (anslag 1:1)</p>	<p>Regions, regional councils and county boards use the appropriation 1:1 including the regional growth policy activities and to contribute to the implementation of ESI Funds programmes. The regional development funds are used to prioritize and co-finance operations under the ESI Funds.</p>	
	<p>Regional Council “free project funds” and regional contributions (Regionförbunds “fria projektmedel” och regionbidrag)</p>	<p>Contribution from these project funds (from County Councils and other members) and Regions might be used for co-financing or pre-studies within ESI Funds.</p>	