



EUROPEAN COMMISSION  
DIRECTORATE-GENERAL FOR EDUCATION, YOUTH, SPORT AND CULTURE

Directorate Culture and Creativity  
Cultural Policy Unit

## **European Commission**

### **Call for tenders EAC/2020/OP/0006**

#### **Implementing steps to develop and promote European Music Export**

#### **Open procedure**

## **TENDER SPECIFICATIONS**

### **Part 2: Technical specifications**

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## **1. General background and references**

### **Overall EU policy context for culture**

The legal basis for action in the area of culture at EU level is Article 3 of the Treaty on European Union and Article 167 of the Treaty on the Functioning of the European Union. Member States have exclusive competence on cultural policy, while the Union's role is to encourage cooperation, support and supplement Member States' actions, and foster cooperation with third countries.

The **New European Agenda for Culture**<sup>1</sup> (New Agenda) is the framework for the European Commission's activities in this area. It aims to harness the full potential of culture to help build a more inclusive and fairer Union, supporting innovation, creativity and sustainable jobs and growth. The international dimension of culture is at the core of the New Agenda, through one of its three strategic objectives, and further developed in the **EU strategy for international cultural relations**<sup>2</sup>, which focuses on strengthening the role of culture in EU's cooperation with non-EU countries.

### **About the music sector in the EU**

Music is both an essential component of Europe's cultural diversity and an important economic sector in the EU –it generates over EUR 25 billion revenues and is the third largest employer within the culture and creative sectors<sup>3</sup>. Europe's music sector is a dynamic sector: over the past years, music production and consumption across Europe have been on a rise and so have been the European music industry revenues.

With the digital revolution and the emergence of new players, new consumption patterns and new business models, the sector has seen fundamental changes in the way music is created, produced, distributed, consumed and monetised. While the industry was adapting to the many opportunities resulting from the new digital environment, such as the possibility to reach out to wider audiences beyond national borders, some challenges persisted, among which the fragmentation of the European music ecosystem. The recent EU study on developing a European Music Export Strategy confirms different stages of development of the music market industry across Europe as well as different music export capacities and different resources allocated to such activities: three countries led the majority of the market revenues in the recorded and the live music sub-sectors (UK, DE, FR); 10 others gathered around 80% of the recorded music revenue per capita; and 15 others were of a smaller size due to a smaller population, a smaller revenue per capita and/or less developed music ecosystems<sup>4</sup>. There is also a great deal of national fragmentation along with language barriers, which continues

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<sup>1</sup> COM(2018) 267 final.

<sup>2</sup> JOIN(2016) 29 final.

<sup>3</sup> Ernst & Young, Creating Growth. Measuring cultural and creative markets in the EU, December 2014, based on 2013 figures.

<sup>4</sup> Le bureau export et alters: Music Moves Europe – A European Music Export Strategy, 2020. Study commissioned by the European Commission

hampering the promotion and visibility of the music repertoire across national borders within Europe and beyond.

While Europe is home to the world's biggest music markets (e.g. Germany, UK, France and Italy), yet non-British European music showed a relatively low performance both within the EU and in large international markets when it came to cross-border streaming and radio listening shares. American, local and British repertoires predominated the listening shares within the EU whilst the non-British European music repertoires represented approximately 10% of the listening shares in key international territories<sup>5</sup>. European music export, understood as the revenue sources of the European music sector stakeholders outside of their national borders (both within the EU and beyond), has remained an untapped potential that could be developed to support the competitiveness and diversity of the European music sector. The above-mentioned study on a European music export strategy analysed these aspects and identified tools at different levels to address them.

### **Impact of COVID-19 on the sustainability of the European music sector**

With the corona crisis, the sector has seen an unprecedented impact on its entire value chain, in particular on the live sector, with massive losses already incurred. Industry experts and financial analysts are projecting that the live entertainment industry will lose billions. There is still a great level of uncertainty as to when and how the sector will be able to resume its activity; COVID-19 may also impact the way music is created, promoted, distributed, consumed and monetised in the future. The sustainability of the whole European music sector will very much rely on its capacity to adapt to the 'new normal'. In such a context, also the export of music across borders and to non-national markets, while remaining crucial for a well-performing European music ecosystem, will need to be rethought and adjusted to the new circumstances.

### **EC sectorial support: Music Moves Europe**

Starting in 2015 to identify key challenges and potential actions to address them, Music Moves Europe (MME) has since become the framework for the European Commission's actions to support Europe's music sector with the overall objective to promote the diversity and competitiveness of the ecosystem.

In the context of the EU budgetary procedures, following a proposal from the European Parliament, a total of 7m € have been earmarked, during three consecutive years (2018, 2019, 2020), to fund so-called Preparatory actions on music, entitled "Music Moves Europe: Boosting European music diversity and talent". The implementation of these Preparatory actions should allow the European Commission to test and prepare elements in particular with

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<sup>5</sup> Le bureau export et alters: Music Moves Europe – A European Music Export Strategy, 2020. Study commissioned by the European Commission. Conclusions based on an analysis of data collected by BMAT42 on a sample of 38 countries (EU28 plus Japan, the Republic of Korea, China, India, South Africa, Mexico, the United States, Canada, the Russian Federation and Turkey).

a view to future EU programme support for music under Creative Europe 2021-2027 - Culture strand.

To implement the 2018 Preparatory action, and in the field of European music export, a call for tenders was launched in late 2018 to carry out a stocktaking exercise of European music export within the EU, analyse four non-EU markets (Canada, China, South Africa and United States), and formulate a European strategy for music export both within the EU and beyond. Published in January 2020, the [study](#)<sup>6</sup> proposes a multi-layered approach, addressing four categories of actors (music sector, representative organisations, EU Member States and EU institutions), and entails specific actions structured around a development path of six progressive steps:

1. **Learn:** creating the conditions to access the relevant knowledge and understanding.
2. **Grow:** reinforcing the operational and professional capacity of the sector.
3. **Cross:** developing support mechanisms to increase export potential within the EU.
4. **Rise:** developing support mechanisms to increase export potential in key non-EU markets.
5. **Exchange:** enabling more non-EU country professionals to discover European music in the EU.
6. **Measure:** developing indicators, data collection mechanisms and measurement frameworks.

## **2. Objectives of the action**

### **General objective**

Building on the study on European music export under the 2018 Preparatory action, the general objective of this call is to generate knowledge and spread understanding of, as well as experiment with, new approaches to European music export through the pilot implementation of certain elements of the proposed European Music Export Strategy.

### **Specific objectives**

- To analyse the key aspects of the impact of COVID-19 on European music export within the EU and beyond.
- Taking into consideration the new environment generated by COVID-19, to develop methodologies and practical tools for European music export that gather, present and make available the knowledge and expertise generated through the piloting of some of the actions developed by the study on a European Music Export Strategy.

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<sup>6</sup> <https://op.europa.eu/en/publication-detail/-/publication/4be2f11d-216c-11ea-95ab-01aa75ed71a1/language-en/format-PDF/source-111483830>

- To explore and experiment with new approaches to European music export in the new environment resulting from the COVID-19 crisis.
- To build the capacity of European music actors involved in European music export, both within the EU and beyond, particularly in those EU countries where the local music ecosystem is smaller or less developed.
- To contribute to the recovery of the European music ecosystem in the new environment resulting from the COVID-19 crisis by building its capacity, experimenting with new approaches, and encouraging stronger ties between the music sectors in the EU and the non-EU countries targeted by this action.
- To provide evidence-based recommendations for future action in this field, including for the international dimension of the new Creative Europe Programme 2021-2027 as well as the sectoral support to music under its Culture strand.

### **3. Tasks**

**The implementation of the activities of this tender is expected to take into consideration the COVID-19 crisis as well as the new environment resulting from it.**

The pilot implementation of elements identified in the study on a European Music Export Strategy will be structured along the development path of that strategy.

**Task I: Analysis of the key aspects of the impact of COVID-19 on European music export and complementary recommendations for the European Music Export Strategy developed in the study (Step 1 – LEARN)**

The study on the European Music Export Strategy shed light on the state of play, gaps and opportunities in relation to cross-border and international circulation of European music prior to the COVID-19 crisis. In order to allow the music sector to better adapt its export practices to the new situation, a pre-requisite is to access updated market information, better assessment of the specificities linked to the new context, and the identification of new and potential opportunities.

The successful tenderer will identify and analyse the key aspects of the disruption caused in the main music sub-sectors in relation to European music export within the EU as well as in the four international markets analysed during the formulation of the strategy (Canada, China, South Africa, US). The successful tenderer will also identify new trends in music export, related potential opportunities and emerging approaches, carry out a needs analysis of the sector (what it would require to adapt music export to the ‘new normal’), and complement the relevant recommendations of the study on the European Music Export Strategy.

The successful tenderer will also complement the analysis of the four non-EU music markets with the analysis of the music markets of two additional non-EU countries. While the successful tenderer may include in its tender its suggested recommendations for the selection of the two non-EU countries to be analysed, the final selection will be agreed with the European Commission during the inception meeting. The selection of the two non-EU music markets to be analysed will need to take into consideration the evolution of the COVID-19 crisis.

The analysis of these 2 non-EU music markets will map success factors and lessons learned; challenges and opportunities; conditions for market entry of European music (e.g. economic features, existing policies or legal frameworks, audiences and consumption patterns, etc.); relevant actors (e.g. professionals, organisations and networks); key events, initiatives and schemes. It will also identify additional funding opportunities that may complement existing support under Creative Europe, ranging from EU programmes (often channelled through the EU Delegations) to initiatives by European actors operating in the third country (e.g. European national cultural institutes, Embassies and consular representations) to programmes by third-country actors.

The market analysis will be carried out through extensive literature review, desk research, reach out (e.g. interviews, consultations), and two fact-finding missions (one per country). The fact-finding missions will consist of establishing relevant local contacts that seek out and prepare new partnerships, developing interviews and surveys, and collecting information to complement the analysis. If the fact-finding missions are not feasible in the new environment resulting from the COVID-19 crisis, a highly professional digital solution must be proposed.

The successful tenderer will prepare an impact analysis, which will include:

- Analysis of the key aspects of the impact of COVID-19 on European music export within the EU and beyond;
- Needs analysis of the sector with a view to adapting music export practices to the new environment resulting from the COVID-19 crisis;
- New trends identified, potential opportunities and emerging approaches;
- Proposed recommendations to complement the relevant tools developed in the study on a European Music Export Strategy;
- Consolidated methodology for market analysis in non-EU countries from a European music export perspective, including checklist(s) and tips;
- Comparative overview of the key aspects of 6 non-EU markets: Country 1, Country 2, Canada, China, South Africa and US;
- Two detailed reports resulting from the two additional non-EU music market analysis, one for Country 1 and one for Country 2. The structure and approach of the country reports will be similar to those in the annexes of the study on a European Music Export Strategy, published in January 2020.

Deliverable (D):

D.1 Impact analysis (20-30 pages, annexes excluded). The report presenting it will include all the items listed above. The two country reports produced will be of no more than 15 pages each.

### **Task II: Design and pilot implementation of a transferable and adaptable model of capacity-building programme (Step 2 - GROW)**

The successful tenderer will design and deliver a pilot programme to build the capacities of music actors interested in and/or working in music export within the EU and beyond. The pilot will serve to test and propose a **transferable and adaptable model** for such a capacity-building programme that may complement existing initiatives at bilateral and multilateral levels.

In the framework of Music Moves Europe, the European Commission is also supporting the training and professionalisation of the music sector through the calls EAC/S18/2018 and EAC/S21/2019. Therefore, where possible, the successful tenderer will take into account the results from such projects and create synergies and complementarities with relevant activities resulting from these two calls when designing and implementing the pilot capacity-building programme on European music export.

### **Target groups**

The pilot capacity-building programme will target different types of relevant actors from the music sector (hereafter “the participants”), for instance (indicative list, not exhaustive):

- Professionals from relevant music sub-sectors, notably live music, recorded music and music publishing;
- Music export organisations and showcases;
- Artists (where relevant).

Participants shall not be remunerated for their participation in the programme.

The pilot programme will be delivered by selected experts, i.e. experienced international music professionals. The experts shall be remunerated for their work to prepare and deliver the programme (experts may be employed or subcontracted by the successful tenderer).

**Both experts and participants may incur travel and accommodation expenses in connection with their involvement in the activities of the programme. However, travel and subsistence expenses will not be reimbursed separately. The quoted price in the offer must be a fixed amount which includes all expenses (including travel and subsistence).**

### **Content and approach**

The content of the pilot capacity-building programme will take into consideration the results of task I (needs analysis, new trends identified, potential opportunities, emerging approaches) and cover the different areas concerned by music export, including the value added and practice of a European approach to music export. Based on a “train the trainer” approach, the programme will pay special attention to those participants that may subsequently act as multipliers in their respective countries, helping artists and peers to work at the international level.

Activities under the capacity-building programme may take different forms, including:

- Training, mentoring and peer learning at the European level, using formats that may combine in-person and e-learning methods;
- Mobility for professional exchanges, in-service training periods and/or job shadowing in organisations outside of the participant’s country of origin, using formats that may combine physical and virtual mobility;
- Innovation lab to design new approaches to distribution, showcase, co-creation, etc., in the field of European music export.



A highly professional digital solution must be proposed in the offer as an alternative option in case face-to-face activities are not feasible in the new environment resulting from the COVID-19 crisis.

The following indicative areas must be considered (the list is not exhaustive), updated and/or complemented following the needs analysis:

- Impact of COVID-19 on European music export within the EU and beyond: gaps, trends, opportunities, emerging approaches;
- Diagnostic report of current and past activities: strengths and weaknesses, goals, opportunities and challenges, gaps;
- Working across national borders in the new environment resulting from the COVID-19 crisis: identifying strategic and natural target markets, developing an internationalisation plan, elaborating a growth strategy;
- Music as a business: navigating main sub-sectors (recorded music, publishing, and live) in the target market(s);
- Music export from a European perspective; identifying common target markets;
- Access to professionals and networks in the target markets (e.g. agents, managers, product managers, PR), including via digital tools;
- Innovation lab: exploring new approaches;
- Evaluation of actions carried out, good practice and knowledge sharing.

### **Selection of experts and participants**

The successful tenderer will be responsible for selecting the participants of the pilot capacity-building programme as well as the experienced international music professionals (experts) that will design and deliver it. The selection of both groups, participants and experts, will be carried out through an open, transparent and inclusive selection process, which will take into account the following criteria:

#### Criteria for experts

- Gender balance (at least 50% of experts must be women);
- Balanced representation of EU Member States in terms of linguistic diversity and size(s) of music markets, paying special attention to smaller or less developed ones;
- Expertise covering different sub-sectors (e.g. live, recorded and publishing) and genres (e.g. jazz, rock, etc.).

#### Criteria for participants

- Gender balance (at least 50% of participants must be women);
- Balanced representation of EU Member States in terms of linguistic diversity and size(s) of music markets, paying special attention to smaller or less developed ones;
- Balanced representation of the live, recorded and publishing sectors;
- Balanced representation of music actors such as artists, managers, publishers, record labels, PR agents, distributors, live promoters, promotion and broadcasting agents, etc.;
- The final selection of participants will cover at least 15 EU Member States.

The successful tenderer will prepare a report on the model of capacity-building designed and tested. The report will include:

- Consolidated methodology and approach for the model of capacity-building programme, which must be transferable and adaptable for the eventual subsequent delivery at different levels (regional/national/European);
- Toolbox of resources for the delivery of the programme;
- Assessment in relation to the general and specific objectives set out in Chapter 2, including achievements, success factors, difficulties, lessons learned and areas for improvement;
- Options for further implementation and adaptation beyond the piloting phase.

Deliverable (D):

D.2 Transferable and adaptable model of capacity-building programme (20-40 pages, annexes excluded). The report presenting it will include all the points listed above.

**Task III: Experimentation with different approaches to reinforce the international foothold of the EU music sector abroad and foster exchanges (Step 4 – RISE and Step 5 - EXCHANGE)**

The successful tenderer will implement a set of activities to support European music export, including experimenting with new approaches identified under tasks I and II. The activities to be implemented may include (indicative list, not exhaustive):

- Shared European trade mission(s), i.e. the organisation of (a) joint economic mission(s) of EU music professionals for professional encounters in non-EU countries (physically, virtually or blended);
- International delegations tour(s), i.e. the organisation of (a) delegation(s) of music professionals from non-EU countries for professional encounters in several EU countries (physically, virtually or blended);
- New solutions/approaches for European music export (e.g. virtual platform or “market place” for exchange, distribution, showcase, co-creation, etc.).

At least one of the activities under this task will be experimenting with new approaches using digital tools. The successful tenderer will propose to and agree with the European Commission the set of activities to be implemented.

**Selection of participants**

The successful tenderer will ensure that the following criteria are applied during the selection of participants in these activities:

- Gender balance (at least 50% of participants must be women);
- Balanced representation of EU Member States in terms of linguistic diversity and size(s) of music markets, paying special attention to smaller or less developed ones;
- Balanced representation of the live, recorded and publishing sectors;
- Balanced representation of music actors such as artists, managers, publishers, record labels, PR agents, distributors, live promoters, promotion and broadcasting agents, music export organisations and showcases, etc.;
- The final selection of participants will cover at least 15 EU Member States.

Participants shall not be remunerated for their participation in the experimental approaches.

Participants may incur travel and accommodation expenses in connection with their involvement in the activities of the programme. However, travel and subsistence expenses will not be reimbursed separately. The quoted price in the offer must be a fixed amount which includes all expenses (including travel and subsistence).

A highly professional digital solution must be proposed in the offer as an alternative option in case the experimentation with approaches requiring face-to-face activities is not feasible in the new environment resulting from the COVID-19 crisis.

The successful tenderer will prepare an analysis of the approaches experimented. The report will contain the following elements:

- Consolidated methodologies;
- Toolbox with resources for implementation;
- Assessment in relation to the general and specific objectives set out in Section 2, including achievements, success factors, difficulties, lessons learned, areas for improvement;
- Recommendations for future implementation.

Deliverable (D):

D.3: Analysis of the approaches experimented (10-20 pages, annex excluded). The report presenting them will include all the items listed above.

#### **Task IV: Recommendations**

The successful tenderer will analyse the evidence collected during the implementation of tasks I, II and III and propose a set of evidence-based recommendations for the future implementation and sustainability of the European Music Export Strategy. The recommendations will take into consideration the next Multiannual Financial Framework 2021-2027, notably targeted support under the future Creative Europe programme and external relations instruments, as well as the new environment resulting from the COVID-19 crisis, its opportunities and limitations.

Deliverable (D):

D.4 Recommendations for the future implementation and sustainability of the European Music Export Strategy as developed by the EU study (max. 10 pages).

#### **Task V: Dissemination of the project**

The successful tenderer will provide a sound and systematic communication and dissemination plan covering the core activities carried out in the framework of the contract and their results. Specific channels, including relevant social media outlets, should be identified preliminarily by the tenderer in the application and then complemented upon launch of the project, in close cooperation with the European Commission at the start of the project.

**The successful tenderer may only communicate and disseminate the results of the actions after receiving the consent of the European Commission.**

Deliverable (D):

## D.5 Communication and dissemination plan.

### **4. Deliverables, reports and meetings with the Commission**

All final deliverables produced for the European Commission and Executive Agencies shall conform to the corporate visual identity of the European Commission by applying the graphic rules set out in the European Commission's Visual Identity Manual, including its logo<sup>7</sup>.

The contractor must deliver the different deliverables (1-5) and reports as indicated below. Further information on the timeframe for their delivery can be found in the Section 5.

The contractor should participate in the kick-off meeting and final report meeting organised by the Commission, related costs should be included in the financial offer (see Annex 6 of Tender Specifications Part 1).

#### **4.1. Deliverables**

The contractor shall submit to the Commission:

- **The communication and dissemination plan (deliverable 5)** no later than 2 months after the signature of the contract.
- **The impact analysis (deliverable 1)** no later than 4 months after the signature of the contract.
- **The transferable and adaptable model of capacity-building programme (deliverable 2)** no later than 12 months after the signature of the contract.
- **The analysis of the approaches experimented (deliverable 3)** no later than 19 months after the signature of the contract.
- **The recommendations (deliverable 4)** no later than 20 months after the signature of the contract.

#### **4.2. Reports**

The following reports should be prepared and submitted to the Commission as described and in respect of the deadlines mentioned hereafter: Inception report, Progress report, Draft final report, Final report.

##### **4.2.1. Inception report**

The inception report must be drafted in English and submitted at least one week before the kick-off meeting with the Commission (see Section 5. Indicative timetable).

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<sup>7</sup> For details see [https://ec.europa.eu/info/resources-partners/european-commission-visual-identity\\_en](https://ec.europa.eu/info/resources-partners/european-commission-visual-identity_en)

The report must include at least:

- Detailed work plan and timetable for implementing the work;
- Details on the approach to be followed for each task;
- A precise indication of the repartition of tasks among the team (and the consortium members, in case of a joint tender).

The inception report shall not exceed 20 pages, annexes excluded. It shall be provided electronically.

#### **4.2.2. Progress report**

One **progress report** must be drafted in English and submitted **15 months** after the signature of the contract.

It will contain:

- Complete information on the activities carried out in pursuit of the results set out in the technical specifications;
- Complete information on the progress achieved towards the results;
- Problems encountered, solutions found or proposed, and impact on future work;
- A clear structure for the final report building on deliverables 1-4;
- A detailed timetable and methodology for completion of the work.

The progress report shall not exceed 30 pages, annexes excluded. It shall be provided electronically.

#### **4.2.3. Final report**

The final report must be written in English (proof-read by a native speaker) and shall be submitted within 22 months after the entry into force of the Contract. The final report should build on and include deliverables 1-4 in a logical and consistent narrative, completed by annexes.

It should include an Executive Summary of 3 pages maximum. The Executive Summary should be provided in English and in French (proof-read by native speakers).

The report must include at least:

- Comprehensive information on all the activities and approaches carried out in pursuit of the results set out in the technical specifications;
- Conclusions and recommendations to the European Commission;
- The following disclaimer:

**“The information and views set out in this report are those of the author(s) and do not necessarily reflect the official opinion of the Commission. The Commission does not guarantee the accuracy of the data included. Neither the Commission nor any person acting on the Commission’s behalf may be held responsible for the use which may be made of the information contained therein.”**

The **draft final report** should be submitted to the Commission at the latest a month before the submission of the final report. It should serve as a basis for the discussion at a final meeting with the Commission the same month.

## **5. Indicative timetable (22 months)**

<b>T0</b>	Contract start
<b>T0 + 2 weeks</b>	<b>Submission of inception report</b>
<b>T0 + 3 weeks</b>	Kick-off meeting with the Commission
<b>T0 + 2 months</b>	<b>Communication and dissemination plan (deliverable 5)</b> submitted to the Commission
<b>T0 + 4 months</b>	<b>Impact analysis (deliverable 1)</b> submitted to the Commission ( <b>first interim payment: 30%</b> )
<b>T0 + 12 months</b>	<b>Transferable and adaptable model for a capacity-building programme (deliverable 2)</b>
<b>T0 + 15 months</b>	<b>Progress report</b> submitted to the Commission ( <b>second interim payment: 40%</b> )
<b>T0 + 19 months</b>	<b>Analysis of the approaches experimented (deliverable 3)</b> submitted to the Commission
<b>T0 + 20 months</b>	<b>Recommendations (deliverable 4) and draft final report</b> submitted to the Commission (ahead of the final meeting with the Commission)
<b>T0 + 21 months</b>	Final meeting with the Commission
<b>T0 + 22 months</b>	<b>Submission of the final report (final payment: 30%)</b>

## **6. Requirements for publication on the internet**

The Commission is committed to making online information as accessible as possible to the largest possible number of users including those with visual, auditory, cognitive or physical disabilities, and those not having the latest technologies. The Commission supports the Web Content Accessibility Guidelines 2.0 of the W3C.

For full details on the Commission policy on accessibility for information providers, see: [http://ec.europa.eu/ipg/standards/accessibility/index\\_en.htm](http://ec.europa.eu/ipg/standards/accessibility/index_en.htm)

For the publishable versions of the Project Report and Executive Summary, the contractor must respect the W3C guidelines for accessible pdf documents as provided at: <http://www.w3.org/WAI/>.

## **7. Graphic requirements**

The contractor must deliver the reports and all publishable deliverables in full compliance with the corporate visual identity of the European Commission, by applying the graphic rules set out in the European Commission's Visual Identity Manual, including its logo. The graphic rules, the Manual and further information are available at: [http://ec.europa.eu/dgs/communication/services/visual\\_identity/index\\_en.htm](http://ec.europa.eu/dgs/communication/services/visual_identity/index_en.htm)