



Tender Specifications annexed to Invitation to Tender

Ref. SJU/LC/0100-CFT

*Provision of web, email and media monitoring support to the
Communication Activities of the SESAR Joint Undertaking*

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founding members



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1 INTRODUCTION

1.1 ACRONYMS AND TERMINOLOGY USED IN THIS DOCUMENT

ATM	Air Traffic Management
CMS	Content Management System
CRM	Customer Relationship Management
GPL	General Public License
GNU	GNU's Not Unix
R&D	Research and development
SESAR	Single European Sky ATM Research Programme
SJU	SESAR Joint Undertaking (European Union body under Council Regulation (EC) No 219/2007 as amended by Council Regulation (EC) No 1361/2008)
PMQP	Project Management and Quality Plan

1.2 INTRODUCTION TO THE SJU

The purpose of the SJU created under Article 187 of the Treaty on the Functioning of the European Union, is to ensure the modernisation of the European air traffic management system through the coordination and concentration of all relevant research and development efforts.

The SJU is responsible for the implementation of the European ATM Master Plan and for carrying out specific activities aimed at the development of a new generation air traffic management system capable of ensuring the safety and fluidity of air transport worldwide over the next thirty years. Further information on the activities of the SJU is available at www.sesarju.eu.

1.3 COMMUNICATION ACTIVITIES AT THE SJU

In order to ensure strong engagement from a wide range of stakeholders, the SJU believes that Communication must be truly integrated into the overall framework of the SESAR Programme. The success of the Programme, and the achievement of the Programme's results, relies heavily on a strong communications plan to ensure that key messages are disseminated to the main audiences of the SJU:

- The membership network of the SJU;
- All staff and/or experts involved in the Programme;
- The wider Air transport community; and
- The general public.

In addition, the SJU aims to raise the political awareness of SESAR with the support of, and in close collaboration with, the European Commission and the members of the SJU. The SJU therefore coordinates its communications efforts with the communication activities planned by the Members of the SJU. Specifically, the SJU undertakes:

- Joint communication activities with the SJU Members & Associate Partners;

- Internal communications targeting the +/- 3000 SESAR dedicated staff;
- Strong presence at several ATM related conferences and workshops to inform the audiences on the SESAR's progress;
- Regular online communication, including internal and external newsletters;
- Enriching databases to reach new air transport stakeholders;
- Selective participation at major conferences concerning ATM and Air Transport;
- Updating and enhancing communication tools such as website, brochures, videos, etc.;
- Communication actions towards passengers at airports;
- Elaboration of communication regarding R&D achievements (Solution Packs) in order to hand over solutions to the industry for implementation.

Details of the tools already in use by the SJU are given in Sections 2.2.1 and 2.3.1 below.

In the future, the SJU wishes to enhance its communications activities in three areas:

1. Improve web presence, by further developing the SJU website in terms of content, design and traffic, and integrating social media platforms.
2. Increase targeted stakeholder communications, using an enhanced and flexible email tool.
3. Better manage press relations, using a media reporting and monitoring tools to gather analytics.

1.4 PURPOSE OF THIS CALL FOR TENDER

In order to sustain and increase its outreach, the SESAR Joint Undertaking needs to have an attractive, well-functioning website that displays the latest content available on the SESAR programme. At the same time, the SJU needs tools with which to reach out to external audiences with targeted communications (emails) and monitor the press coverage of its communications work.

For this purpose, the SJU is launching an open call for tender divided in 3 (three) lots aimed at concluding a maximum of 3 (three) service contracts for the provision of the following services:

- Lot 1: Online content management, web hosting and maintenance services
- Lot 2: Email marketing tool and related services
- Lot 3: Media monitoring tool and related services

The same tenderer may submit a tender for one, two or the three lots. See section 3 below for further information on contractual aspects.

This document constitutes the tender specifications accompanying the SJU's Invitation to tender. It sets out the purpose and the scope of the call for tenders, describes the types of services that will be covered under the contract/s and may be requested (as detailed in Section 2 below) and the evaluation procedure on the basis of the exclusion, selection and award criteria (as detailed in Section 4 below).

1.5 INDICATIVE TIMETABLE

Milestone	Deadline
Launch of this call for tenders	April 2014
Deadline for requesting additional information/clarification from the SJU	No later than 15 calendar days before the closing date for submission of tenders
Last date on which clarifications are issued by SJU	No later than 6 calendar days before the closing date for submission of tenders
Deadline for reception of tenders at SJU's premises	June 2014
Expected notification of award	July 2014
Expected contract signature and starting of implementation	September 2014

2 TERMS OF REFERENCE

The following section provides information on the background and context for each of the lots and the required services and deliverables.

Tenderers should note that the working language at the SJU is English and therefore the SJU normally only creates communication materials in English, although sometimes these can be translated for specific events or activities.

2.1 LOT 1: ONLINE CONTENT MANAGEMENT, WEB HOSTING AND MAINTENANCE SERVICES

2.1.1 Background

The SJU's public website is the main communications tool and prime source of information for the stakeholders that the SJU aims to reach:

- Members, partners, associate partners, and SJU staff
- Stakeholders of SESAR
- Other EU institutions and other active aviation professionals
- Media
- Aviation, European affairs and environmental specialists
- General public, specifically air passengers

Recently re-designed on a Drupal 7 platform, the SJU website attracts 20,000 visits monthly and seeks to be an exemplary model of website design, user-friendliness and innovation. Within the website, particular attention is paid to communicating SESAR Programme's approach and achievements to targeted audiences, through animations, graphics and videos. The website is hosted by an external service provider.

In addition to the website, the SJU also has an Intranet running on SharePoint, which is accessible only to SJU staff. The SJU places great importance on having strong internal communications, and with this in mind, seeks to keep the content of its intranet up to date and interesting for staff to read. It should be foreseen that some improvements to this tool will be required in the coming months.

Furthermore, the SJU regularly sends out internal and external e-newsletters, as well as ad-hoc mail shots and event invitations. The contacts database associated with the email marketing campaigns contains some 30,000 stakeholder contacts as well as 5,000 journalists. On average, the SJU sends 50 campaigns annually (E-news, invitations), as well as 20 press releases sent per year.

In terms of Social Media, the SJU currently is active on LinkedIn, YouTube, Twitter, Flickr and Slideshare. Additional platforms may be targeted in the future.

2.1.2 Services required

The future Contractor may be required to provide the following services (the list is **non-exhaustive**). Other services similar in kind and nature may be requested depending on the needs of the SJU.

2.1.2.1 Online Content management

Main services:

- Publishing event announcements, news, calls and other new content for the SJU website and the Intranet;
- Creating new web pages, including related metadata and links;
- Adding documents and maintaining the publications library on the SJU website;
- Converting and formatting images and other graphical resources into banners for the website and intranet;
- Creating, publishing and managing online polls and surveys;
- Selecting, editing and publishing photos and images;
- Identifying videos and multimedia material from SJU partners to enrich SJU website;
- Maintaining the image library of website and intranet;
- Updating and maintaining contacts lists within the SJU's e-mail marketing tool (to be selected), importing contacts, dealing with spam and bouncing addresses;
- Creating e-newsletter templates, formatting monthly e-newsletters, preparing mailing lists, testing and sending;
- Preparing content for other ad-hoc, targeted email campaigns, such as event invitations and press releases, creating related templates, mailing lists,
- Conducting post-analysis of email campaigns, including open e-mails, click-throughs, unsubscribed, and leads generated to ensure campaigns reach the intended audience;
- Creating new areas in the website for specific promotional campaigns, such as large SESAR events or the SESAR 2020 Programme;

- Editing audio and video content for use of SJU website and social media platforms, and creating video loops for use at events;
- Maintaining the SESAR E-learning platform, which currently runs on Moodle;

Proactive advice:

Main activities include:

- Conduct progress monitoring and review of services. For this purpose the SJU welcomes, but does not explicitly request, the use of a project management tool for monitoring and reporting.
- Offering creative ideas for the online content visualisation;
- Providing ongoing advice on the relevance of the tasks and activities;
- Alerting SJU when services requested go beyond the scope of the contract and proposing solutions that would meet the SJU needs in terms of budget and scope.

2.1.2.2 Website hosting and maintenance services

Main services:

- Managing the hosting of the SJU website, which entails the following:
 - Identifying a reliable cloud hosting service (e.g. PaaS platform or IaaS infrastructure)
 - Defining appropriate SLA in accordance to the requirement set in section 2.1.5 below such as availability, downtime, backup/restore, disaster recovery, load balancing;
 - Setting up and configuring the hosting environment;
 - Coordinating with current hosting organisation or web site maintenance organisation to ensure a smooth migration to the new hosting environment, including related actions such as DNS change, search engine re-indexation.
- Maintaining CMS application (Drupal), installing new releases or patches, and resolving bugs and incidents as they arise;
- Maintaining content types, views and other Drupal elements;
- Upon request from SJU, modifying parts of the web site or developing and implementing new functionalities;
- Improving site architecture and navigation, such as maintaining the LAMP stack (Linux, Apache, MySQL and PHP);
- Ensuring the optimal referencing by search engines;
- Removing obsolete and outdated information;
- Enhancing search engine for the SESAR R&D library;
- Cross referencing with partners' sites;
- Producing regular web and, media and social media statistics;
- Managing user access to the website;

- Conducting quality control of the website, media platform and social media channels;
- Liaising with other SJU contractors to ensure coherent planning for online management and development, for example with contractors responsible for email and media monitoring platforms and Intranet re-development (SharePoint).

Interoperability and Standards:

- The web maintenance undertaken should be compliant with the latest web and accessibility standards, and existing browsers and platforms;
- The CMS system and other web applications and databases shall be preferably Open Source software with GPL, GNU or equivalent licences; proprietary software could also be envisaged;
- The CMS and the various web applications and light CRM need to link or integrate seamlessly;
- The website and its applications should be responsive on multiple platforms – cross browser tablets and smartphones.

2.1.3 Deliverable/s

A **project plan** that is based on assessment of the services described above in 2.1.2

Timing for submission: To be further defined at the kick off meeting to be held upon signature of the contract.

2.1.4 Team for contract implementation

The tenderer shall propose a team to ensure the adequate completion of the tasks.

Regardless of whether the team is composed of one or several persons, **at least one of them shall be a senior**; further details on requirements of the senior and junior profiles are provided in section 4.3.3.1.1 below.

The team proposed shall cover following profiles:

2.1.4.1 Project management

The person in charge of this task shall be the main contact point with the SJU and will be in charge of overseeing the overall project activities, including among others:

- Liaising with other contractor/s to manage any possible hand-over;
- Managing workflows for the website design, content (including graphical) management and maintenance;
- Responding to SJU requests;
- Participating in progress meetings with the SJU;
- Carrying out the reporting duties on all activities.

2.1.4.2 Online and web management

The person in charge of this task shall undertake the following:

- Developing and managing website and intranet content, as described in section 2.1.2.1

- Dealing with backend and maintenance issues, as described section 2.1.2.2
- Organising and participating in progress meetings with the SJU

2.1.5 Service Level Agreement

Special attention to flexibility, efficiency and proactive (as opposed to reactive) approach is a must for the performance of the activities.

2.1.5.1 Volume, availability and response time

For the tasks regarding **online content management**:

- Availability during working hours of the SJU; Monday to Friday from 9.00 a.m. to 18.00 p.m.
- Volume: Average of 2 hours per day; 120 hours every quarter¹. The reporting on the hours worked, including additional hours, will be done on a quarterly basis as indicated in section 2.1.5.3 below.

For the tasks regarding **website hosting and maintenance services**:

- Availability 24*7
- Volume: Constant running of the activities
- Response time for interventions:
 - i) 4 hours in case of critical situations such as downtime, disaster recovery, load balancing.
 - ii) 24 hours for all other type of interventions.

2.1.5.2 Place of performance

Most of project management related tasks will take place at the future Contractors' own premises. Nevertheless, the future contractor shall be available to work onsite on SJU premises upon request.

Meetings may take place on the SJU's premises or via teleconference.

In any case, costs of attending any meeting or performing tasks on the SJU premises shall be borne exclusively by the future Contractor.

2.1.5.3 Monitoring, reporting and payments

The SJU will monitor the performance of the tasks described above in Section 2.1.2. A project management tool for monitoring and reporting could be proposed by the tenderer for this purpose.

A kick off meeting shall take place on the SJU premises upon signature of the contract with the purpose of setting the working agenda and methodology. Shortly after the kick off meeting, the future contractor shall submit to the SJU a project plan covering the activities to be performed during the first quarter.

¹ A three-month period

Progress meetings between the **future Contractor** and the SJU will take place on a monthly basis either by teleconference or on the SJU premises. These meetings will monitor the progress of the work.

The future contractor shall submit within the first week of each quarter a quarterly report addressing the following points:

- Compilation of the completed tasks, dates of on-site web support, and statistics on these support and maintenance activities
- Costs incurred which shall include the quarterly flat fees and the additional (if applicable) hours worked.
- Description of any deviation and its causes from the plan set in the previous quarter.
- Proposed planning for the next quarter, including the specific dates for onsite web support

An alternative reporting methodology to the above explained, that would be in any case subject to discussions and agreement of the SJU, may be proposed by the future contractor.

Payments are to be made on a quarterly basis, subject to the approval of the quarterly report, or any other request made by the SJU.

2.2 LOT 2: EMAIL MARKETING TOOL AND SERVICES

2.2.1 Background

The SJU regularly sends out internal and external e-newsletters, as well as ad-hoc mail shots. The contacts database associated with the email marketing campaigns contains some 30,000 stakeholder contacts as well as 5,000 journalists. On average, the SJU sends, 50 campaigns annually, which means 50,000 emails, on a monthly basis (E-news, invitations), as well as 20 press releases sent per year.

The SJU is seeking to implement an email marketing tool that should offer state-of-the-art email marketing campaign management, newsletter template design, contacts management and campaign analysis, among other features.

2.2.2 Services required

The future Contractor may be required to provide the following services (the list is **non-exhaustive**). Other services similar in kind and nature may be requested depending on the needs of the SJU.

2.2.2.1 Project management

Develop a Project Management and Quality Plan (“PMQP”) for the configuration and migration of the email marketing software. The Plan should include the following components:

- Project timeline;
- Change control management;
- Risk management;
- Standards, procedures and methods;
- Deliverable products;

- Roles and responsibilities;
- Scope and description of the project
- Conduct technical analysis (user requirements analysis, analysis of the organisational aspects of deployment; Graphical User Interface proposals).

2.2.2.2 Email marketing tool configuration and hosting

Configuration and hosting services include among others:

- Provide, install and configure the new email marketing tool based user requirements;
- Migration of tools to new email marketing tool:
 - the current templates used within the SJU (e-news, inside news, event invitations, announcements, press releases...) and create new templates based on SJU corporate identity;
 - database of images;
 - contacts and lists;
 - Set-up the automatic synchronisation with SJU website e-news registration form (based on Drupal) ;
- Develop and execute factory acceptance testing;
- Deliver training sessions for administrators;
- Develop a user manual;
- Launch the email marketing tool with all its functionalities.

2.2.2.3 Support and maintenance

Special attention to flexibility, efficiency and proactive (as opposed to reactive) approach is a must for the performance of the activities.

- Proactive approach in the identification of problems and proposal of solutions.
- Provide maintenance service for the solution only (content excluded). This includes handling incidents, problems, change and release management;
- Design a set of new templates based on SJU requirements;
- Response within 24 hours.
- Availability: working hours of the SJU; Monday to Friday from 9.00 a.m. to 18.00 p.m.

2.2.3 Deliverable/s

An **email marketing tool** installed and configured that should satisfy the following specifications:

- Software: A commercial off-the-shelf web-based solution, preferably based on Open Source software
- Hosting: A hosted solution with 24*7 availability; scheduled downtime: 4h per month; unforeseen downtime: 4h maximum. Availability of services and restore times: 98%. Response time for restoring the web servers are as follows: 95% within 2 hours, 5% within 4 hours

- Email creation: User-friendly interface for the creation of e-news (formatted text, graphics, hyperlinks); preview; wysiwyg or source code editing; plain text option; add email footer fields (unsubscribe...); social media links; easy handling of templates (creation, editing, maintenance); personalisation; mobile-ready templates; image management
- Campaign management: Creation and launch of campaigns; campaign scheduling; SPAM test functionality; test email functionality; online version of the email; social media integration
- Contract management: Import/export mailing lists; unsubscribed contacts management; groups and lists; custom demographics or contact attributes; handling of duplicate
- Email reporting features:
 - statistics; opened, forwarded and bounced emails; handling of unsubscribed and undelivered emails; export/download reports; compare reports
 - Integration with Drupal to allow interested subscribers to subscribe via the SJU Website

Date and content of first delivery and project plan for implementation shall be further defined at the kick-off meeting.

2.2.4 Team for contract implementation

The tenderer shall propose a team to ensure the adequate achievement of the tasks.

Regardless of whether the team is composed of one or several persons, **at least one of them shall be a senior**; further details on requirement of the senior and junior profiles are provided in section 4.3.3.1.2 below.

The team proposed shall cover following profiles:

2.2.4.1 Project management

The person in charge of this task shall be the main contact point with the SJU and will be in charge of overseeing the overall project activities, including among others:

- Liaising with current contractor in order to transfer over relevant data and templates
- Managing project workflow described in section 2.2.2.1 above
- Responding to SJU requests
- Participating in progress meetings with the SJU
- Carrying out the reporting duties on the all the activities.

2.2.4.2 Email marketing tool installation

The person in charge of this task shall undertake the following:

- Configure and customise the email marketing tool and undertake the migration of SJU content, as described in the Section 2.2.2.2 above
- Handling maintenance issues, bugs and updates as described in Section 2.2.2.3 above
- Helpdesk services
- Participating in progress meetings with the SJU when needed

2.2.5 Place of performance

Whereas the services requested will be mostly performed at the future contractor's premises, meetings or on site interventions may take place on the SJU's premises or via teleconference.

Costs of attending any meeting shall be borne exclusively by the future Contractor.

In any case costs of attending any meeting or performing tasks on the SJU premises shall be borne exclusively by the future Contractor.

2.2.6 Monitoring, reporting and payments

The SJU and the future contractor shall work using a methodology (i.e.: SCRUM or any other) to be agreed for the project management and the email marketing monitoring configuration and installation as described in Section 2.2.2 above.

A kick off meeting shall take place on the SJU premises upon signature of the contract with the purpose of setting the working agenda and methodology. Shortly after the kick off meeting, the future contractor shall submit to the SJU a project plan covering the activities to be performed during the first quarter.

Progress meetings between the future Contractor and the SJU will take place on a regular basis either by teleconference or on the SJU premises. These meetings will monitor the progress of the work. The future contractor shall submit within the first week of each quarter a report addressing the following points:

- A. Before the configuration and installation of the email platform:
 - Description of any deviation and its causes from the plan set in the previous quarter.
 - Proposed planning for the next quarter, including the specific dates for intervention
 - List of the completed tasks, and statistics on support and maintenance activities
 - Costs incurred
- B. After the configuration and installation of the email platform:
 - List of the completed tasks, and statistics on support and maintenance activities
 - Costs incurred

An alternative reporting methodology to the above explained, that would be in any case subject to discussions and agreement of the SJU, may be proposed by the future contractor.

Payments are to be made on a quarterly basis, subject to the approval of the quarterly report, or any other request made by the SJU.

2.3 LOT 3: MEDIA MONITORING TOOL AND SERVICES

2.3.1 Background

The SESAR programme attracts a good level of media interest, particularly from industry press, however, the SJU does not currently have a tool in place which can monitor this press coverage. In addition, the SJU seeks to raise the visibility further among press and widen its outreach about the benefits that the programme can bring to society. With this in mind, the SJU is seeking a news

monitoring tool, offering online media monitoring, press contacts search and management tools, news coverage analysis and exploitation functionalities.

2.3.2 Services required

The future Contractor may be required to provide the following services (the list is **non-exhaustive**). Other services of a similar kind and nature may be requested depending on the needs of the SJU.

2.3.2.1 Project management

Develop a Project Management and Quality Plan (“PMQP”) for the configuration and migration of the media monitoring software.

The Plan should include the following components:

- Project timeline;
- Change control management;
- Risk management;
- Standards, procedures and methods;
- Deliverable products;
- Roles and responsibilities;
- Scope and description of the project
- Conduct technical analysis (user requirements analysis, analysis of the organisational aspects of deployment; Graphical User Interface proposals).

2.3.2.2 Monitoring tool configuration and hosting

Configuration and hosting services include among others:

- Provide, install and configure/customise the media monitoring software based on user requirements;
- Design SJU customised interface, with pre-defined views and analytics;
- Conduct acceptance testing of tool and integration, where necessary, with SJU website and intranet;
- Provide training to administrators and users;
- Create user manual and provide documentation updates
- Launch the solution with all its functionalities.

2.3.2.3 Support and maintenance

Special attention to flexibility, efficiency and proactive (as opposed to reactive) approach is a must for the performance of the activities.

- Proactive approach in the identification of problems and proposal of solutions.
- Provide maintenance service for the solution only (content excluded). This includes handling incidents, problems, change and release management;
- Design a set of new templates based on SJU requirements;
- Response within 24 hours.

- Availability: working hours of the SJU; Monday to Friday from 9.00 a.m. to 18.00 p.m.

2.3.3 Deliverable/s

A **media monitoring tool** installed and configured that should satisfy the following specifications:

- Software: A commercial-off-the-shelf web-based solution preferably based on Open Source software;
- Hosting: A hosted solution with 24*7; scheduled downtime: 4h per month; unforeseen downtime: 4h maximum per month;
- Online Media monitoring: that has global coverage, is multilingual and covers online news, as well as printed publications, full articles and images, in addition to references (handling of paid subscriptions);
- Search functionality, with query & filters according to SJU business needs, criteria and keywords;
- Social media monitoring;
- Media analytics, including readership data;
- Daily reports;
- Press clippings archiving and management;
- Media contacts database;
- Press clipping reports creation and distribution capabilities;
- Press Relations measurement functionality.

Date and content of first delivery and project plan for implementation to be further defined at the kick-off meeting.

2.3.4 Team for contract implementation

The tenderer shall propose a team to ensure the adequate achievement of the tasks.

Regardless of whether the team is composed by one or several persons, **at least one of them shall be a senior**, further details on requirement of the senior a junior profiles are provided in section 4.3.3.1.2 below.

The team proposed shall cover following profiles:

2.3.4.1 Project management

Main contact person who will be in charge of overseeing the overall project activities, including:

- Liaising with any other contractor of the SJU
- Managing project workflow described in Section 2.3.2.1 above
- Responding to tasks requests and/or technical questions
- Participating in regular meetings with the SJU
- Carrying out the reporting duties on the all the activities

2.3.4.2 Monitoring tool configuration and hosting

The person in charge of this task shall undertake the following:

- Configure and customise the monitoring tool and undertake the migration of SJU content, as described in the Section 2.2.2.2 above
- Handling maintenance issues, bugs and updates as described in Section 2.3.2.3 above
- Participating in progress meetings with the SJU when needed

2.3.5 Place of performance

Whereas all services requested will be performed at the future contractor's premises, meetings or on site interventions may take place on the SJU's premises or via teleconference.

Costs of attending any meeting shall be borne exclusively by the **future Contractor**.

In any case costs of attending any meeting or performing tasks on the SJU premises shall be borne exclusively by the **future Contractor**.

2.3.6 Monitoring, reporting and payments

The SJU and the **future Contractor** shall work using an agreed methodology (i.e.: SCRUM or any other) for the project management and media monitoring tool configuration and installation, as described in Section 2.3.2 above

A kick off meeting shall take place on the SJU premises upon signature of the contract with the purpose of setting the working agenda and methodology. Shortly after the kick off meeting, the future contractor shall submit to the SJU a project plan covering the activities to be performed during the first quarter.

Progress meetings between the **future Contractor** and the SJU will take place on a regular basis either by teleconference or on the SJU premises. These meetings will monitor the progress of the work. The future contractor shall submit within the first week of each quarter a report addressing the following points:

- C. Before the configuration and installation of the email platform:
 - Description of any deviation and its causes from the plan set in the previous quarter.
 - Proposed planning for the next quarter, including the specific dates for intervention
 - List of the completed tasks, and statistics on support and maintenance activities
 - Costs incurred
- D. After the configuration and installation of the email platform:
 - List of the completed tasks, and statistics on support and maintenance activities
 - Costs incurred

An alternative reporting methodology to the above explained may be proposed by the future contractor.

Payments are to be made on a quarterly basis, subject to the approval of the quarterly report, or any other request made by the SJU.

3 INFORMATION ABOUT THE CONTRACT/S

3.1 NATURE

The contract(s) to be concluded is/are (a) direct service contract(s). Therefore, a maximum of three economic operators will be selected as a result of this call for tender (i.e. for all three lots).

In submitting a tender, the tenderer accepts all terms and conditions specified in the draft contract.

3.2 DURATION

The duration of the contract is 12 months, which may be renewed for up to a total duration of 48 months (see Article I.2 of the draft contract annexed to the Invitation to tender).

The maximum duration of the contract shall not exceed the duration of the SJU in accordance with amended Council Regulation (EC) No 219/2007 of 27 February 2007 on the establishment of a Joint Undertaking to develop the new generation European air traffic management system (SESAR), unless during the period of the validity of the contract the Regulation is amended to extend its duration.

3.3 VALUE

The maximum budget allocated for this contract for its total duration is 50440,000 EUR (VAT excluded).

The indicative amount per Lot would be:

Lot 1: EUR 42360 000

Lot 2: EUR 240 000

Lot 3: EUR 640 000

The SJU may negotiate the repetition of similar services entrusted to the selected contractor/s for a maximum of a 50% of the total values above indicated in these tender specifications²

3.4 VARIANTS

Variants on the terms of reference are not permitted.

3.5 INTELLECTUAL PROPERTY RIGHTS

The tenderer to be selected for award of the contract will be subject to the IPR provisions of the draft contract which is annexed to Invitation to tender ref. SJU/LC/100-CFT, i.e. Articles I.8 and II.10 thereof.

In addition, it should be noted that, if the activity results (please, refer to the draft contract for the definition of the “results”) are not to be fully created for the purpose of the contract it should be clearly pointed out in the tender. There should be information provided about the scope of pre-existing materials, their source and when and how rights to them have been acquired.

² As per Article 134 (1) f) and (3) of the Commission delegated Regulation (EU) no 1268/2012 of 29 October 2012 on the rules of application of regulation (EU, Euratom) no 966/2012 of the European Parliament and of the Council on the financial rules applicable to the general budget of the Union.

In the tender all quotations or information originating from other sources and to which third parties may claim rights have to be clearly marked (source publication including date and place, creator, number, full title etc.) in a way allowing easy identification.

4 ASSESSMENT OF THE TENDERS AND AWARD OF THE CONTRACT

4.1 INTRODUCTION

The assessment will be strictly based on the content of the received tenders and in the light of the criteria set out hereunder.

The assessment procedure will be carried out in three consecutive stages, each of them with a precise aim:

- Stage 1 – assessment in the light of exclusion criteria (see section 4.2 below),
- Stage 2 – assessment in the light of selection criteria (see section 4.3 below) and
- Stage 3 – assessment in the light of award criteria (see section 4.4 below).

The aim of each of these stages is:

1. To check on the basis of the exclusion criteria, whether the tenderer can take part in the procurement procedure;
2. To check on the basis of the selection criteria whether the tender has the necessary legal, economic and financial, technical and professional capacity for the performance of the contract;
3. To assess on the basis of the award criteria each offer which has passed the exclusion and selection stages.

4.2 ASSESSMENT IN THE LIGHT OF EXCLUSION CRITERIA

In order not to be excluded from participation in the present procedure, the tenderer (the coordinator, each consortium member, and identified subcontractors) shall provide evidence of not being in any of the following situations:

- a) is not bankrupt or being wound up, is not having its affairs administered by the courts, has not entered into an arrangement with creditors, has not suspended business activities, is not the subject of proceedings concerning those matters, and is not in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) has not been convicted of an offence concerning professional conduct by a judgment which has the force of *res judicata*;
- c) has not been guilty of grave professional misconduct proven by any means which the contracting authorities can justify;
- d) has fulfilled all its obligations relating to the payment of social security contributions and the payment of taxes in accordance with the legal provisions of the country in which it is established, with those of the country of the contracting authority and those of the country where the contract is to be carried out;
- e) has not been the subject of a judgement which has the force of *res judicata* for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the SJU/Union's financial interests;
- f) is not a subject of the administrative penalty for being guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the

procurement procedure or failing to supply an information, or being declared to be in serious breach of his obligation under contract covered by the EU budget.

Evidence to be provided

1. Accordingly, tenderers (the coordinator and each consortium member) must provide a **Declaration on honour** (see Annexe 4), duly signed and dated, stating that they are not in one of the situations referred to above³.

Nota Bene:

The Tenderer (i.e.: the coordinator, each consortium member and identified subcontractors) to which the contract is to be awarded shall provide, within 14 calendar days following notification of award and preceding the signature of the contract, the **original** Declaration on honour (if provided in copy at the offer submission stage) and the following documentary proofs (**originals**) to confirm the declaration referred to above:

2. For situations described in (a), (b) and (e), production of a recent⁴ extract from the judicial record is required or, failing that, a recent equivalent document issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied. Where the tenderer is a legal person and the national legislation of the country in which the tenderer is established does not allow the provision of such documents for legal persons, the documents should be provided for natural persons, such as the company directors or any person with powers of representation, decision making or control in relation to the tenderer.
3. For the situation described in point (d) above, recent⁵ certificates or letters issued by the competent authorities of the State concerned are required. These documents must provide evidence covering all taxes and social security contributions for which the Tenderer is liable, including for example, VAT, income tax (natural persons only), company tax (legal persons only) and social security contributions.⁶
4. For any of the situations (a), (b), (d) or (e), where *any* document described in two paragraphs above is *not issued* in the country concerned, *it* may be replaced by a sworn or, failing that, a solemn statement made by the interested party before a judicial or administrative authority, a notary or a qualified professional body in his country of origin or provenance.

The SJU may waive the obligation of a tenderer to submit the documentary evidence referred to above if such evidence has already been submitted to the SJU for the purposes of another procurement procedure and provided that the documents are not more than one year old starting from their issuing date and that they are still valid. In such a case, the tenderer shall declare on his honour that the documentary evidence has already been provided in a previous procurement procedure and confirm that no changes in his situation have occurred.

³ Where parts of the services are intended to be subcontracted the tenderer has also to ensure that the subcontractors satisfy the exclusion criteria as indicated in section 18 of the invitation to tender. Where a consortium is submitting a tender, each member of consortium must provide the required Declaration on honour as indicated in section 18.bis of the mentioned invitation

⁴ Not older than one year.

⁵ Not older than one year.

⁶ Tenderers are strongly advised to explore the sources in their respective national legal systems for acquiring the required supporting documentation and the related deadlines, already at the stage of the preparation and submission of their offers, in order to avoid any delays in providing the documents in case selected for award of the contract.

Please refer to the following web page for additional information regarding the relevant requirements and model documents under national laws of the EU Member States:

http://ec.europa.eu/internal_market/publicprocurement/e-procurement/e-certis/index_en.htm.

4.3 ASSESSMENT IN THE LIGHT OF SELECTION CRITERIA

The tenderer must have the overall capabilities (legal, economic, financial, technical and professional) to perform the contract. All the requirements listed below must be met in order to enter the next phase of the assessment in the light of award criteria.

Please note that in the selection phase, assessment focuses on the past experience and capacity of the tenderer, and not on the quality of the (technical) offer. The latter is to be assessed in the light of the award criteria.

The SJU may waive the obligation for a tenderer to submit the documentary evidence requested under Sections 4.3.1 , 4.3.2 and 4.3.3 below if such evidence has already been submitted for another procedure and provided the documents were issued not more than one year earlier and are still valid. In such cases, the tenderer must declare on his honour that the documentary evidence has already been provided in a previous procedure with the SJU, provide reference to that procedure, and confirm that there has been no change in the situation.

4.3.1 Legal capacity

Tenderers (the coordinator and each consortium member) are requested to prove that they are authorised to perform the contract under the national law.

Evidence to be provided:

1. The tenderer (or the coordinator in case of consortia) shall provide a dully filled-in Legal entities' form, including all its supporting documentation (see section 7 b) of the invitation to tender Ref. SJU/LC/0100CFT).
2. Evidence of inclusion in a trade or professional register, or a sworn declaration or certificate, membership of a specific organisation, express authorisation or entry in the VAT register.

4.3.2 Economic and financial capacity

The tenderer (the coordinator and each consortium member) shall be in a stable financial position and have sufficient economic and financial capacity to perform the contract.

Evidence to be provided:

Proof of economic and financial capacity shall be furnished by the following documents:

1. Evidence of professional risk indemnity insurance;
2. Balance sheets (or extracts from balance sheets) for at least the last two years for which accounts have been closed;
3. Statement of overall turnover during the last three financial years;

If, for some exceptional reason which the SJU considers justified, the tenderer (the coordinator and each consortium member) is/are unable to provide the references requested here above, the tenderer (the coordinator and each consortium member) may prove the economic and financial capacity by any other means which the SJU considers appropriate.

Nota bene: Public bodies and higher education establishments are not subject to a verification of their economic and financial capacity

founding members



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4.3.3 Technical and professional capacity

The technical and professional capacity of the Tenderer (the coordinator and each consortium member), proving suitability to provide the services to be covered by the Contract will be evaluated on the basis of the minimum requirements and evidence as described in the subsequent paragraphs.

To that end, those not complying with the following minimum requirements will not go to the subsequent assessment stage.

4.3.3.1 Minimum requirements

4.3.3.1.1 For Lot 1 - Online content management and web maintenance

1. The **Tenderer** must meet the following requirements
 - i) Expertise of working in IT web project management;
 - ii) Advanced knowledge of Drupal 7, SharePoint 2007/2013 and open source CMS, XML, XSL/XSLT, XML Schema, XHTML, Flash Player, Moodle and CSS, together with experience in structured exchanges between different types of CMS, SQL Server 2008;
 - iii) Advanced knowledge of web maintenance;
 - iv) Advanced knowledge of the latest web content developments (e.g. jquery, CSS3, HTML5...).
 - v) Proven experience of working in an English-speaking environment.
 - vi) Proven experience of working in an international environment.

2. Team members:
 - a) The **Senior** profile must possess at least ten years' experience of working on online content and web maintenance projects, with expertise in the following:
 - i) Drupal 7, SharePoint 2007/2013 and open source CMS, XML, XSL/XSLT, XML Schema, XHTML, Flash Player, Moodle and CSS, together with experience in structured exchanges between different types of CMS;
 - ii) Using and customising e-mail marketing tools;
 - iii) Developing e-voting/pollings and social media-based viral campaigns
 - iv) Developing content using Photoshop, Adobe Creative Suite and InDesign, Moviemaker and sound editing software;
 - v) Understanding of web server languages
 - vi) Follows latest web content developments (e.g. jquery, CSS3, HTML5...);
 - vii) High proficiency in English (mother tongue equivalent).

 - b) **Junior** profiles, should there be any in the project team, shall possess:
 - i) At least three years' experience of working on online content and web maintenance projects,
 - ii) Proficiency in the skills described under the senior profile description.

4.3.3.1.2 For LOTS 2 and 3 - Email marketing and Media monitoring tool and services

1. The **Tenderer** shall have:

- i) Advance expertise of email marketing (for Lot 2) and/or media monitoring (for Lot 3) tool configurations, with proven track record in project management (all phases);
- ii) Advanced expertise of integrating email marketing (for Lot 2) and/or media monitoring (for Lot 3) tools within Drupal/website environment;
- iii) Proven experience of working in an English-speaking and in an international environment

2. For other team members:

a) The **Senior** profile must possess at least 10 years' of experience working on email marketing (for Lot 2) and/or media monitoring (for Lot 3) tool configurations, with:

- i) Proven track record in project management (all phases);
- ii) Excellent working experience of Java, JavaScript, SQL, SOQL, CRM, Web Services, and XML and their use in the development of email marketing tools (for both Lots);
- iii) Advanced expertise of integrating marketing tools within Drupal/website environment (for Lot2);

~~iv) Proven track record of integrating media monitoring tools within Drupal 7/website/SharePoint 2007/2013 environment (for Lot 3)~~

~~v)iv) High proficiency in English (mother tongue equivalent);~~

~~vi)v) Proven experience of working in an English-speaking and in an international environment~~

b) **Junior** profiles, should there be any in the project team, shall possess:

- i) At least three years' experience of installing and configuring email marketing (for Lot 2) and/or media monitoring (for Lot 3) tools;
- ii) Excellent working experience of Java, JavaScript, SQL, SOQL, CRM, Web Services, and XML and their use in the development of email marketing tools (for both Lots);
- iii) Expertise of integrating marketing tools within Drupal/website environment (for Lot 2);

~~iv) Proven track record of integrating media monitoring tools within Drupal 7/website/SharePoint 2007/2013 environment (for Lot 3)~~

~~v)iv) High proficiency in English (mother tongue equivalent).~~

4.3.3.2 Evidence to be provided for each lot

1. For the tenderer:

- i) Brief presentation of the tenderer containing a detailed description of the structure (coordinator, other member/s and/or already identified subcontractors, focusing in particular on the capacity and the organizational structure set up to perform the activities) and main current activities;
- ii) References or evidence from other entities, at least two to which similar services were provided.
- iii) List of projects and activities performed in the above described activities within the last 5 years, using template provided in Annexe 6.B

2. For the staff profiles:

- i) Detailed CVs (only) of the persons who will be responsible for carrying out the tasks;

4.4 ASSESSMENT IN THE LIGHT OF AWARD CRITERIA

Only the tenders meeting the requirements of the exclusion and selection criteria will be evaluated in terms of quality and price for the award of the contract.

The contract will be awarded to the economically most advantageous tender on the basis of the following evaluations:

4.4.1 Technical evaluation

The quality of each technical offer will be evaluated in accordance with the award criteria and the associated weighting detailed in the table below.

Each tender must reach a minimum score of 50% or more per criterion and 70 points or more globally as a result of the technical evaluation in order to be admitted to the financial evaluation. For lower scores, the tenders will be considered non-suitable and therefore excluded.

Nota bene: Tenders presenting a mere repetition of the tender specifications or source documentation as part of the technical offer will be scored below the minimum required.

Technical Award Criteria	Maximum available
Organisational aspects of the tenderer Adequacy of the proposed Tenderer's structure and alignment to the requirements set in Section 2 Suitability of the composition and balance of the proposed team Suitability of the proposed resources assigned to each deliverable and activity in terms of skills and proposed material	20
Proposed products and solutions Efficiency, quality and usefulness of the Proposed products and solutions so as to match the needs identified in Section 2.	20
Analysis of the case studies	30

Understanding of the requirements Appropriateness of the solutions and approach proposed Creativity and outlook Timeline and budget	
Quality assurance and contract management: Evidence of arrangements for ensuring: <ul style="list-style-type: none"> • Continuity of services • Rapid response and timely delivery • Highest quality of services • Appropriate availability of the expertise required 	30
Total score technical evaluation	100

4.4.2 Financial evaluation

The price to be taken into account for the financial evaluation and for the award of the contract is the one proposed by the Tenderer by using the financial offer form provided in Annexe 6.A

The lowest priced acceptable (that is eligible and has obtained at least the minimum points required in the technical evaluation) Tender, will be used to compare the price of the remaining acceptable Tenders.

4.4.3 Recommendation for award

The contract will be awarded to the Tenderer offering the highest ratio by weighting quality (score of technical evaluation compared to the Tender with highest score for quality) against price (price quoted in the financial offered compared to the lowest price) on a 70/30 basis as indicates the following formula:

$$\text{Overall score} = [(\text{Technical score of Offer Y} / \text{Highest technical score}) \times 70\%] + [(\text{Lowest price} / \text{Price of Offer Y}) \times 30\%]$$

5 ANNEXES

ANNEX 1 – Case Study for Lot 1

ANNEX 2 – Case Study for Lot 2

ANNEX 3 – Case Study for Lot 3

ANNEX 4 - Declaration of honour

ANNEX 5 - Draft contract

ANNEX 6 – A) Financial offer form, and B) Template for List of projects and activities