



Specifications annexed to Invitation to Tender

Ref. SJU/LC/0148-CFT

Provision of strategic communications, editorial support, graphical, digital and events-related communications services

8 February 2019

founding members



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1. INTRODUCTION

1.1 Acronyms and terminology

ATM	Air Traffic Management
ATM Master Plan	ATM Master Plan available at https://www.atmmasterplan.eu/
Eurocontrol	European Organisation for the Safety of Air Navigation
MA	Membership Agreement
MFA	Multilateral Framework Agreement
PPP	Public Private Partnership
SESAR	Single European Sky ATM Research
SJU	SESAR Joint Undertaking (hereafter referred to as “ SJU ”), a joint undertaking within the meaning of Article 187 of the Treaty on the Functioning of the European Union, set up by 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), as amended by Council Regulation (EC) 1361/2008 of 16 December 2008, and further amended by Council Regulation (EU) No 721/2014 of 16 June 2014.
DPO	Data Protection Officer
SEA	Strategy & External Affairs

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 (ATM) system through the coordination and concentration of all relevant research and development efforts.

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 ATM 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 Objectives and scope of SJU Communications activities

In order to ensure strong engagement from a wide range of stakeholders, the SJU believes that communications must be truly integrated into the overall framework of SESAR. The overall goal of SJU communications strategy is to:

- Illustrate and showcase the solutions that the SESAR is already delivering and the tangible benefits they bring to the aviation industry and society as a whole;
- Extend awareness-raising and outreach on SESAR in order to secure stakeholders commitment and bring SESAR solutions to the next level of capability;

- Promote SESAR as an integral part of the day-to-day aviation world, leveraging on its role in making the Single European Sky a reality;
- Enhance the partnership spirit of the SJU through communications activities with SJU staff, members and experts.

The success of the SESAR Development Phase, and the achievement of SJU's results, relies on a strong communications plan to ensure that key messages are disseminated to the SJU's main audiences of:

- Interested general public, such as concerned citizens or citizens whose opinions matter to decision makers;
- General EU and national decision makers, who are influential and are considered opinion leaders;
- Specialist ATM/Aviation-related community, including decision-makers;
- ATM experts and SESAR staff.

SJU targets the above-mentioned audiences through strategic offline (printed material) and online communications (website and social media), events and the media.

2. TERMS OF REFERENCE

2.1 Subject

This document constitutes the tender/technical specifications accompanying SJU's invitation to tender. It aims to describe the purpose of this call for tender, in particular:

- its scope,
- the types of services that will be covered under the 3 Framework Service Contracts to be awarded (one for each Lot) and may be requested (as detailed in Section 2), as well as
- the evaluation procedure on the basis of the exclusion, selection and award criteria (as detailed in Section 4).

2.2 Objective and scope

The objective of this call for tender is to provide the SJU with external support - both online and offline - related to strategic communications, editorial support and graphic design, digital communications and events. All content created under the terms of the specific contracts linked to each framework contract must be delivered in a format that enables the SJU to disseminate it by whichever means and whichever communications campaign in the context of its communications strategy as SJU may deem appropriate.

For this purpose, the SJU is launching an open call for tender divided into 3 (three) Lots aimed at concluding a maximum of 3 (three) **single framework service contracts** (one per Lot) for the following assignments:

- Lot 1: Strategic communications, editorial support and graphic design
- Lot 2: Digital communications
- Lot 3: Event communications

The same tenderer may submit a tender for one, two or all three Lots. Each tender submitted should include a case study (see Annex 4 for a description of the case study per lot).

2.3 Description of required services

The services to be provided are described in the present section. It should be noted that subcontracting is allowed subject to the conditions set in point 18 of the Invitation to Tender.

All the activities related to the services described below must be carried out upon request and instructions by the SJU and under its supervision.

2.3.1 Lot 1: Strategic communications, editorial and graphic design

The services to be provided under Lot 1 are related to the strategic conception, design, drafting and production, in any medium (offline and online) of communications content and branding material relating to the activities of the SJU.

The SJU regularly publishes written communications material, such as brochures, factsheets, reports, posters, press releases, planning documents, info graphics and branding material. In preparing this material, the SJU identifies the targeted audiences and develops accompanying strategic messages. It also researches content and chooses the appropriate editorial and graphic style for the communications material in line with its in-house editorial and graphical guidelines. The resulting written communications is disseminated through SJU's online communications channels (website and social media) and in printed format at events and through mailing distributions.

In 2018, the SJU produced three major hard print publications as well as several smaller brochures. In addition, the SJU contributed to 10 media articles, where editorial support from the contractor was required. All SJU publications and content are available on the SJU website www.sesarju.eu.

In this context, the SJU might at any moment seek advice from the future Contractor in relation to the services described above and innovative ways of approaching its target audience groups.

In parallel and in order to tailor its external communication activities, the SJU may use Lot 1 as a mechanism for intelligence gathering on, as well as SJU positioning with external audiences through subscriptions to trade magazine subscriptions or advertorials in magazines/newspapers. In 2018, the SJU purchased a magazine subscription to the Financial Times, as well as an online subscription to Politico.

SJU communications material is in principle published in English. On occasion materials may be produced in the 5 other ICAO languages (French, Spanish, Chinese, Arabic and Russian).

The services subject of the specific contracts under the Framework contract may concern the following fields and should result in the deliverables described below (the list is not exhaustive and aimed at drawing up a hypothetical scenario):

2.3.1.1 Strategic communications

- Providing strategic communications support, such as identifying and mapping target audiences (e.g. general public, ATM experts, policy makers, press and media) and identifying their communication interests, developing messages, proposing appropriate communications and promotional materials and channels for dissemination;
- Measuring the impact and effectiveness of the content developed regarding the target audiences.

2.3.1.2 Editorial support

- Researching and analysing information on requested topics and providing advice on editorial content and the structuring of messages;
- Conducting interviews with policymakers, as well as aviation and ATM experts;
- Upon instruction from the SJU, writing, translating, revising and proofreading material, such as articles, factsheets, reports, speeches, magazines, newsletters, brochures, leaflets, social media posts, sub-websites, posters, slogans, banners, advertisements, press releases, interviews, and other communications content. All content must be reviewed and approved

by the SJU, comply with the EU Interinstitutional Style Guide, as well as SJU's internal editorial guidelines;

- Designing, planning and drafting content for use in communications campaigns, in printed form, in electronic form or on the web;
- Adapting editorial material according to national or regional audiences.

2.3.1.3 Graphic design and printing

- Creating artwork such as drawings, illustrations, visuals in accordance with the SJU visual identity. All proposals are expected to generate and maintain visual and artistic coherence throughout various campaigns;
- Overseeing graphic design, layout and the production of files in the format required (for example, Adobe InDesign, Illustrator and Photoshop or equivalent press and web optimised pdf) for the communications material such as reports, brochures, leaflets, newsletters, press material, project descriptions and magazines, consistent with existing or future graphic charts;
- Providing rapid (no more than 72 hours) turnaround of limited print runs of information products;
- Dispatching and transporting printed material;
- Adapting all print products with a view to putting them on websites and/or other electronic media (E-books, CD-ROM, all DVD formats, USB keys, SD cards, etc.);
- Graphic design and production of advertisements and advertorials for all media;
- Photography, including obtaining/formatting images, photos and other appropriate illustrations, and obtaining photographs reusable by the SJU with the appropriate copyright disclaimer;
- Producing infographics, charts, diagrams and any other forms of data visualisation, such as animated infographics;
- Producing and supplying promotional and presentational material, conference kits, information packs for various target audiences;
- Developing social media graphical elements ('shareables');
- Making available to the SJU the source files, photos and fonts used so that these can be re-used in the same form or in modified form in any future SJU's actions.

2.3.1.4 Branding material

- Proposing branding material according to the scope of the SJU's work and target audiences in the respect of environment-friendly materials and productions;
- Applying and adapting existing logos, the visual identity and text (web addresses, etc.) to different branding items.

2.3.1.5 Impact on data protection

Some of these services are considered to have an impact on the rights of data subject with regards the processing of their personal data. As such, these services (listed below) shall be provided in full compliance with the data protection and privacy principles stated in section 2.5:

- Social media monitoring, and in particular target audiences and profiling
- Photography, in terms of collection, use and destruction of images

2.3.2 Lot 2: Digital communications

The services to be provided under Lot 2 are related to the strategic conception of digital communications strategies, electronic and web-based material, audio-visual products and mobile applications. The SJU develops a range of digital communications to support its strategic communications objectives. These may include short animations, videos, presentations, e-learning tools, as well as web-based products and audio-visuals for events and virtual events. The majority of this material is disseminated through SJU's website (Drupal 7 platform), which attracts 20,000 monthly visits and seeks to be an exemplary model of website design, user-friendliness and innovation. Within the website, particular attention is paid to communicating SESAR's approach and achievements to targeted audiences. The SJU already has a service contract in place with an external service provider for the hosting and maintenance of SJU website, as well as the development and distribution of SESAR e-news. This Lot does not focus on these communications channels; however, it does not exclude at some point an eventual cooperation with other service providers of the SJU or the direct provision of these services.

Digital communications is also disseminated through SJU's e-newsletters, as well as ad-hoc mail shots and event invitations. In terms of social media, the SJU currently is active on LinkedIn, YouTube, Twitter and Flickr. Additional platforms may be targeted in the future.

As an example, the SJU recently produced the following videos, which can be viewed on the SESAR YouTube page:

- 1) SESAR 2020
- 2) SESAR Solutions Catalogue
- 3) U-space animation

In addition, the SJU has created the following tangible digital tools, which are used at events:

- 1) A virtual reality tool on SESAR solutions at airports
- 2) An augmented reality u-space tool
- 3) A SESAR interactive tool, showcasing the implementation of SESAR projects in Europe, this has also been customised to be used on our website.

In this context, the SJU might at any moment request advice from the future Contractor in relation to the services described below and innovative ways of approaching its target audiences. All SJU's digital content is available through SJU website: www.sesarju.eu.

The services subject of the specific contracts under the Framework contract may concern the following fields and should result in the deliverables described below (the list is not exhaustive and aimed at drawing up a standard scenario):

2.3.2.1 Conception of digital communication strategies

- Providing advice to the SJU for the conception of digital communication strategies in the field of multimedia and web services according to SJU's needs e.g. a specific event or communications campaign;

- Identifying target audience groups and their interest, giving advice on the appropriate channels (such as social media, websites and other online platforms) to be used and in designing communications campaigns.

2.3.2.2 Electronic product creation

- On the basis of the requests received by the SJU, designing and creating products for the internet, involving the creation and development and testing of the concept, script, structure and content, developing ergonomic interfaces, e-learning tools, html interfaces, digital illustrations, website banners, computer and online simulations and educational games, animated presentations, music files and podcasts.

2.3.2.3 Web based material

As mentioned above, the SJU already has a service contract in place for the hosting, maintenance and content management of the SJU website. Subject to SJU's requests and indications, web services related to this framework contract should include:

- Designing and creating HTML tools. These can be interactive tools either for use on the SJU website or other relevant websites;
- Designing, creating and implementing web pages, mini websites or micro sites. For example, a website created for a specific event or project. It should be noted that these websites will be hosted by the providers of the SJU web service contract.

2.3.2.4 Audio-visual media products

- Subject to SJU's requests and indications: Developing concepts, ideas, scripts and storylines for audio-visual productions to imaginatively and effectively describe the work of the SJU, including technical aspects;
- Developing augmented and virtual reality/multimedia tools, making use of the latest technology platforms.
- Developing original visuals, such as animated graphics or animations (2D or 3D) for audio-visual productions in order to make the subjects dealt with accessible and comprehensible;
- Producing videos in various formats, including reportages, promotional clips, video products aimed at social media distribution (app store optimisation);
- Screen casting and voice-over where appropriate;
- Subtitling and dubbing in the languages of the target audiences, including translation and/or adaptation of texts, commentaries, subtitles;
- Obtaining and respecting the copyright clearance of any material provided by SJU members, partners or external stakeholders. In addition, the future Contractor will make available to the SJU the masters of the edited material, raw footage and full rushes of the audio-visual products, indicating copyright clearances.

2.3.2.5 Audio-visual coverage of events

- Managing and producing video, audio and photo coverage of events (in Brussels or elsewhere in Europe and beyond), such as conferences, seminars, press briefings, exhibitions, awards ceremonies, openings etc., including:
 - Filming of events and editing footage;

- Interviews with speakers or other stakeholders;
- Web streaming;
- Live social media proliferation (e.g. live tweeting at events).

2.3.2.6 Audio-visual editing and re-editing of pre-existing footage

- Performing miscellaneous tasks, such as subtitling (existing) productions in other languages, voice-overs, mixing, video editing, incorporation of special effects, duplication, etc. Mixing may include mixing raw footage with animated material;
- Supplying upon request and in addition to the original edited production and raw footage, any re-edits which may be necessary to re-use parts of one or more productions for additional communication activities - The future Contractor will need to obtain and respect the copyright clearance of any pre-existing material.

2.3.2.7 Delivery of formats and labelling

- Making available to the SJU master copies of the edited material, raw cut footage and full rushes of the audio-visual products. The formats and number of copies required will vary according to the specific needs of any given project, but may include:
 - Compressed files, made available on future Contractor's FTP server and for upload on websites, streaming server or social media (e.g. YouTube), hence on various formats such as wmf, flv, mov, mp4 as well as other formats for broadcast quality;
 - Playable DVDs;
 - Multimedia and interactive functionalities including for hand-held devices (smartphones and tablets);
 - Given the technical development in the audio-visual field, the Future Contractor may also be asked for other formats;
- Providing all the audio-visual productions in video streaming format readable by the most popular viewers available either as high definition or low definition. The future Contractor may be asked to provide screenshots in high resolution to develop other communications tools such as printed material.

2.3.2.8 Mobile applications

- Creating mobile applications for the most common mobile platforms, namely Google Android and iOS. It must be ensured that a HTML version of any mobile application is made available for users of no smart devices. The future Contractor must also provide training to allow the SJU to manage the content population independently;
- After implementation of the solution, the SJU should be able to benefit from support by the future Contractor for: Signing and publishing the app, dealing with problems as they arise; monitoring technical migrations and the need for updates; monitoring user feedback and acting upon user problems.

Please note that the future Contractor will not bear costs related to accounts maintenance or pay fees as this will be handled by the EU Publications Office.

2.3.2.9 Impact on data protection

Some of these services are considered to have an impact on the rights of data subject with regards the processing of their personal data. As such, these services (listed below) shall be provided in full compliance with the data protection and privacy principles stated in section 2.5:

- Innovative ways to target audience
- Designing, creating and implementing web pages, mini websites or micro sites.
- Producing videos in various formats
- Managing and producing video, audio and photo coverage of events, such as conferences, seminars, press briefings, exhibitions, awards ceremonies, openings etc.

2.3.3 Lot 3: Event communications

This Lot aims to provide the SJU with support in the logistics planning and preparation of event organisation. Events may include conferences, workshops, seminars, site visits, press briefings, demonstrations, exhibitions and virtual events, such as webinars and social media chats.

The SJU is responsible for the organisation of internal and external events, press conferences and press trips, trade fair exhibitions, large stakeholder conferences, workshops, staff team building activities etc. Most events take place in Europe but occasionally event support is required for events taking place in other regions of the world.

An overview of SJU's past event activities can be found on the SJU website: <http://www.sesarju.eu/newsroom/events>

In a typical year, the SJU organises an average of 6 events, with a participation of approximately 200 people. On average 1 event per year is organised outside the EU (previous events have taken place in Singapore, Beijing, Dubai, Washington, Montreal), and 5 inside the EU.

The SJU regularly takes part in two major aviation exhibitions/trade shows:

- World ATM Congress, Madrid
- At least one international Air Show (e.g. Paris Air Show, Berlin Air Show, Singapore Air Show...) depending to the theme of the event and the communications priorities of the SJU.

The SJU may also support ad hoc events and exhibitions organised by either the International Civil Aviation Organisation (ICAO), the European Commission or Eurocontrol on transport related topics.

The SJU also organises several events independently aiming to attract approximately 200 stakeholders on specific technical topics or work areas - these events take place up to 4 times a year.

As part of the internal communications strategy, the SJU organises two team-building events per year.

A listing of all events at which SJU has a presence are available on the SJU website www.sesarju.eu.

The services subject of the specific contracts under the Framework contract may concern the following fields and should result in the deliverables described below (the list is not exhaustive and aimed at drawing up a standard scenario):

2.3.3.1 Planning and logistics

- Managing participant registrations and attendance;

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- Organising interpretation and translation, recording and transcription of discussions in a number of languages (ICAO languages only);
- Managing logistics such as securing event venues, including any necessary associated equipment and services, particularly catering, furniture and audio-visual material;
- Managing contracts, when applicable, for exhibitions, stands, workshops and conferences where the SJU is participating (see section 3);
- Organising transport (to and from the venue), including transfers between the arrival point and the venue or hotels, or other linked events, for event participants;
- Organising accommodation for SJU staff and speakers and/or participants;
- Managing payment and reimbursement of costs linked to registration, travel, accommodation and any other necessary expenses for relevant participants e.g. speakers or press;
- Storage of material, such as stands, banners, exhibitions.

2.3.3.2 Content and material

- Creating, designing, updating and producing exhibitions stands;
- Creating, designing and producing event-related material (i.e. conference packs, participant badges, goodies, banners, decorations for the building, publications such as the programme and information pack, and materials linked to events (billboards, advertising posters, badges, bags, pens, CD-ROMs, DVDs, etc.), in accordance with the SJU visual identity;
- Dispatching or transporting (by land, by sea or by plane) communications material for events;
- Organising cultural and artistic performances to enhance events;
- Organising creative team-building activities aimed at enhancing the collaborative spirit of SJU's employees;
- Managing virtual events, such as webinars or online tutorials, and combining the dissemination of presentations with interactive services such as chat using SJU's social media channels.

2.3.3.3 On-site and post-event support

- Assembling and disassembling exhibition stands, including putting up and taking down banners;
- Providing secretarial and hosting services for the event or managing recruitment and management of on-site event staff (hostesses/stewards) who can speak the language(s) required for a particular event;
- Managing the catering services to be provided during an event;
- Ensuring the web-streaming and broadcasting of an event as well as to ensure the post-production of audio-visual material resulting from an event to be released;
- Event feedback and follow-up: dissemination of results, publication of the proceedings and conclusions of the event on paper, electronically and audiovisually (CD-ROM, DVD, etc.).

2.3.3.4 Impact on data protection

Some of these services are considered to have an impact on the rights of data subject with regards the processing of their personal data. As such, these services (listed below) shall be provided in full compliance with the data protection and privacy principles stated in section 2.5:

- Managing participant registrations and attendance
- Organising accommodation of speakers and/or participants to events
- Managing payment and reimbursement of costs linked to registration, travel, accommodation and any other necessary expenses for relevant participants e.g. speakers or press
- Managing virtual events, such as webinars or online tutorials
- Providing secretarial and hosting services for the event or managing recruitment and management of on-site event staff (hostesses/stewards)

2.4 Compliance with Data Protection principles and privacy by design

Due to the nature of communication services (high visibility, extensive use of ICT technology and possible use of subcontractors), the contractor will be acting as an external processor, eventually as a co-controller in certain specific processes, when processing personal data on behalf of SJU.

In addition to compliance with Regulation 2016/679 (GDPR)¹ for processing operations of personal data within its own remit, services mentioned above shall be provided in strict compliance with Regulation 2018/1725² (EU DPR) applicable to the SJU as a European Union body. Also, the contractor shall comply with any relevant Guidelines of the European Data Protection Supervisor (EDPS) and internal SJU rules applicable to communication activities in the broad sense, among others:

- The Guidelines of the EDPS on Webservices³ and on Mobile applications⁴ and its future updates. All Guidelines and updates are available at https://edps.europa.eu/data-protection/our-work/our-work-by-type/guidelines_en
- Presentation of EDPS
- SJU social media policy, available as a reference document

¹ Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, and repealing Directive 95/46/EC (General Data Protection Regulation) (Text with EEA relevance)

² REGULATION (EU) No 2018/1725 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 23 October 2018 on the protection of natural persons with regard to the processing of personal data by the Union institutions, bodies, offices and agencies and on the free movement of such data, and repealing Regulation (EC) No 45/2001 and Decision No 1247/2002/EC

³ “Guidelines on the protection of personal data processed through web services provided by EU institutions”

⁴ “Guidelines on the protection of personal data processed by mobile applications provided by European Union institutions”

- SJU legal notice and data protection policy available in the SJU public web: <https://www.sesarju.eu/legal-notice>

The above list of guidance is not exhaustive as it is subject to constant update; the Contractor will be notified in case of new updates on SJU policies and shall keep a proactive approach in terms of monitoring the updates of the EDPS Guidelines.

Compliance with data protection principles shall be implemented through the full contract cycle taking into account, inter alia, the following elements:

- Technical advice to the SEA team and SJU DPO in the updating of the system of records of processing operations so as to ensure compliance with the applicable legal framework.
- Proactive approach and strict cooperation with the SEA team and SJU DPO in the collection of consent, data management and preparation and dissemination of privacy statements through several channels, including events, webs and videos.
- Design of privacy friendly solutions, proactive approach and timely involvement of the contractor's Data Protection Officer and SJU Data Protection Officer (SJU DPO) for within the design and development of any web based material, audio-visual product.
- Especially relevant in the case of use (through subcontracting) of third party technologies, international transfers shall be duly justified by the contractor and approved in advance and in writing by the SJU. In case a processing involves transfers of personal data to third countries or international organisations, prior to the processing, inform the SJU DPO and Controller, about the measures intended to undertake to ensure compliance with Chapter V of the EU DPR in terms of adequacy decision or appropriate safeguards.
- Privacy friendly approach in terms of social media monitoring, identification of target audience groups by foreseeing the provision of information to data subjects on the processing of personal data relating to them.

2.5 Approach to sustainable procurement

The SJU encourages and expects environmentally friendly performance of the works in accordance with all applicable standards.

Environmentally performance of the works in accordance with all applicable standards will be part of the evaluation of the tenders as indicated in Section 4.5 of these Tender specifications.

2.6 Working arrangements and schedule

Contractors will set up a team combining all the know-how and experience necessary to carry out the tasks described in these specifications.

The tender must include a list of persons composing the proposed team, including back-up persons. All members of the team who are in contact with the SJU must be able to work in English. See section 4.3.3 for more details of the required technical capacity.

The Contractor must inform the SJU of any changes (departures, arrivals, promotions, etc.) in the composition of the team during the performance of the contract.

Throughout the full duration of the contract, the composition of the team must ensure compliance with all qualifications and quality levels requested for the provision of the services in these tender specifications. In order to ensure continuity of services, in case of any change in the composition of the team, the Contractor shall guarantee the replacement of the person(s)/role(s) concerned within

5 working days. However, the Contractor shall adopt all reasonable endeavours to minimise the number of changes in the composition of the team.

The Contractor must provide the training programmes necessary to ensure a constant high quality of services of the team.

The SJU reserves the right to request the replacement within 5 days of any member of the team whose experience and/or competence deems to be inadequate, stating its reasons.

Special attention will be paid to the approach proposed by the future Contractor for managing subcontractors. The future Contractor will be required to indicate the kinds of work, which they plan to subcontract and the name of any companies to which they are already intending to subcontract a part of the work in accordance with Point 18 of the Invitation to tender.

The working arrangements described in this Section are applicable to any member(s) of the team, including persons from subcontractors).

2.6.1 Contract management

The Contractor shall appoint a **contract manager per Lot**. 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 contract and related project activities, including among others:

- Liaising with other previous/future Contractor(s) to manage any possible hand-over also at the end of the contract;
- Managing workflows for the contract management and maintenance;
- Responding to SJU requests;
- Participating in progress meetings with the SJU;
- Carrying out the reporting duties on all activities.

2.6.2 Team members

The composition of the teams for each Lot is indicated in Section 4.3.3 of these tender specifications.

2.7 Implementation of the contract and procedure to be followed

The **framework service contracts** will be implemented through **specific contracts** according to the template annexed to the draft contract attached to the invitation to tender.

The future Contractors will be requested to submit a specific offer.

As the need for support arises, the SJU shall submit a request for services describing the services to be provided, the timing, the estimated level of effort, a milestone payment plan, when applicable, and the deliverables expected to be produced. The future Contractor shall make his offer in response to SJU's request for services within the deadline set.

2.7.1 Procedure for the management of the framework and specific contracts

This section defines the mechanisms used for the management of the framework contract and the specific contracts based upon it. In addition, it gives the service level metrics and quality parameters related to the services to be provided.

2.7.2 Request for services

The future Contractor should submit a specific tender in response to SJU's request for services for specific contracts within the deadline set of 5 working days. The specific tender shall not represent a repetition of the content of the request for services; instead, it shall include technical and financial sections covering the following topics:

1. Technical description on how the future Contractor intends to carry out the services;
2. List of the proposed personnel to carry out the requested services, specified per service/deliverable;
3. Total number of man-days and the number of man-days that it is considered necessary to complete the requested services, specified per activity/deliverable and option (if applicable);
4. Proposed fixed total price requested for the activities in accordance with Article I.6 of the Framework Contract;
5. Proposal for a milestone payment plan based on the duration of the services to be performed under this, including interim payments in case needed in accordance with Article I.6.2 of the Framework Contract;
6. Any other element that the contract would wish to highlight and that is not listed in any of the above points.

In terms of service provision, the future Contractor must respect the following quality criteria:

- Availability at the starting date;
- Respect of starting date;
- Effective presence of staff during the execution;
- Provision of the correct level of expertise in relation with the request;
- Quality requirement for the preparation of specific tender in terms of:
 - o Compliance with price list (See Annex 5);
 - o Level of creativity, in terms of responding to the brief, proposing original ideas and capturing the strategic communications objectives of the SJU;
 - o Proposed timeline.
- Client satisfaction with service execution (contract implementation) in terms of:
 - o Compliance with proposed timelines;
 - o Compliance with proposed service execution;
 - o Resulting service provision meeting SJU objectives.

2.8 Place of performance

The services may take place anywhere in the European Union territories or, exceptionally, outside these territories.

2.9 Contract duration

The duration of the contract is 12 months, which may be automatically renewed 3 times for up to a total duration of 48 months (Article I.3 of the draft contract).

The estimated date of start of the activities is June 2019.

2.10 Handover to the next contractor

At the end of the contract, the Contractor shall take the necessary steps to ensure efficient and effective handover of activities to the next contractor to guarantee continuity of operations. Upon conclusion of the contract, the contractor will be required to provide the SJU and the next contractor with all the necessary information to continue the services.

Timing for submission: 1 month before the expiry date of the framework contract.

2.11 Payments

Payments will be executed in accordance to article I.6 of the draft Framework service contracts attached to the Invitation to Tender.

2.12 Variants

Variants on the terms of reference are not permitted.

2.13 Contract value

It is expected that approximately up to three specific contracts per Lot per year will be given to the selected future Contractor(s).

The maximum allocated budget for the contract(s) is estimated at 1.454.000,00 (VAT excluded) for the total maximum duration of the contract(s).

The indicative amount per Lot would be:

- LOT 1: EUR 340.000,00 (85.000,00 EUR/year over 4 years)
- LOT 2: EUR 354.000,00 (88.500,00 EUR/year over 4 years)
- LOT 3: EUR 760.000,00 (190.000,00 EUR/year over 4 years)

SJU may negotiate the repetition of similar services entrusted to the selected contractors for a maximum of a 50%⁵ of the total values below indicated in these tender specifications.

NB: These figures are purely indicative and in no way should be construed as binding the SJU.

2.14 Monitoring and deliverables

2.14.1 Monitoring, reporting and meetings

A kick-off meeting should take place on SJU premises upon signature of the contract with the purpose of discussing working requirements and methodology.

A planning meeting will take place at the launch of each specific contract to discuss the activities and timeline for deliverables. The future Contractor will provide the SJU with regular progress reports on the delivery of specific contract deliverables. This may be done through email but also through ad hoc meetings, either online, by-phone or face-to-face, upon the request of the SJU.

Upon request of the SEA team or the SJU DPO, the contractor will provide input to records of processing of personal data or prepare privacy statements for dissemination through different channels.

⁵ As per Point 11.1 (e) (for services) and (f) (for supplies) of Annex 1 to the Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union

A project management tool for monitoring and reporting may be proposed by the tenderer for this purpose. 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.

2.14.2 Quality assurance

The future Contractor will guarantee full quality control of all the services provided, in line with the requirements set out in these tender specifications. The tender should include a quality plan that the future Contractor intends to adopt for the performance of the services requested. It should specify how the future Contractor intends to monitor and ensure high quality and effective follow-up of the services he may be called upon to provide to the SJU during the performance of the contract. The proposed quality plan will set out, among other things, the various specific contracts the future Contractor intends to implement and the indicators he intends to use to ensure the quality and monitoring of the services performed and compliance with the deadlines and to report on the efficiency, effectiveness and value for money of the implemented communication actions.

2.15 Intellectual Property Rights

Intellectual property rights will be governed by the relevant provisions of the draft Framework Contract annexed to the Invitation to tender.

The contractor must comply with all the IPR requirements included in the description of the services above.

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.

In addition, the tenderer should foresee in its tender the management of different licences required for the provision of services.

3. INFORMATION ABOUT THE PROCEDURE

3.1 Indicative timetable

Milestone	Indicative date
Dispatch of the contract notice to the Official Journal of the EU	8 February 2019
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 the SJU	No later than 6 calendar days before the closing date for submission of tenders
Deadline for reception of tenders at SJU's premises	22 March 2019
Notification of award	May 2019
Contract signature	May/June 2019

3.2 Subcontracting

Subcontracting of tasks under the contract is permitted but the contractor will retain full liability towards the SJU for performance tasks of the Service contract as a whole.

Special attention shall be paid to the applicable legal framework on data protection and privacy safeguards when planning the subcontracting of a services whose provider is not based in the EU of EFTA territory.

During the service contract execution, the change of any subcontractor identified in the tender will be subject to prior written approval of the SJU. For all the details, please refer to Section 18 of the Invitation to tender.

4. ASSESSMENT OF THE TENDERS AND AWARD OF THE CONTRACT

4.1 Introduction

The evaluation is based solely on the information provided in the submitted tender. It involves the following:

- Verification of non-exclusion of tenderers on the basis of the exclusion criteria;
- Selection of tenderers on the basis of selection criteria;
- Verification of compliance with the minimum requirements set out in these tender specifications;
- Evaluation of tenders on the basis of the award criteria;

The SJU will assess these criteria in no particular order. The successful tenderer must pass all criteria to be awarded the contract.

For British tenderers:

Please be aware that after the UK's withdrawal from the EU, the rules of access to EU procurement procedures of economic operators established in third countries will apply to tenderers from the UK depending on the outcome of the negotiations. In case such access is not provided by legal provisions in force, tenderers from the UK could be rejected from the procurement procedure.

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 any possible subcontractors already identified at this stage, shall provide evidence **of not being in any** of the situations of exclusion listed in the Declaration on honour attached hereto in Annex 1.

As an **evidence** thereof, the tenderer tenderers (the coordinator, each consortium member), and any possible subcontractors already identified at this stage, must provide a Declaration on honour (see Annex 1), duly signed and dated, stating that they are not in one of the situations listed therein.⁶

Possible remedial measures are also specified in Annex 1.

Nota Bene:

The tenderer (i.e.: the coordinator, each consortium member) 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 all the documentary proofs (originals) referred to in Annex 1 to confirm the Declaration on honour.

⁶ 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 invitation to tender Ref. SJU/LC/0148-CFT. 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. When a new subcontractor is identified and proposed to SJU during the implementation of the contract, the new entity must submit the same evidence requested to subcontractors identified at the moment of the submission of the tender.

The period identified above may be extended by the SJU upon a tenderer's express request.

For any further information on the document to be provided by national practitioners, please refer to the following web page: <https://ec.europa.eu/tools/ecertis/search>.

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 were issued not more than one year earlier and that they are still valid at dispatch of the information for candidates and tenderers. In such a case, the tenderer shall declare on his honour that the documentary evidence has already been provided in a previous procurement procedure, provide reference to that procedure and confirm that no changes in his situation have occurred.

4.3 Assessment in the light of selection criteria

Tenderers (the coordinator and each member of the consortium, if any) must have the overall capabilities (legal, economic, financial, technical and professional) to perform the contract. The SJU reserves the right to request from subcontractors evidence on technical and professional capacity when these are meant to perform critical tasks.

All the requirements listed below must be met in order to enter the next phase of the assessment in the light of award criteria.

All the requirements listed below must be met.

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 are requested to prove that they are authorised to perform the contract under national law.

Evidence to be provided:

- 1) Tenderers shall provide a dully filled-in Legal entities' form, including all its supporting documentation (see section 7 b) of invitation to tender Ref. SJU/LC/0148-CFT).
- 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 member of the consortium, if any) 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 at least two of the following documents:

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

If, for some exceptional reasons which the SJU considers justified, the tenderer is unable to provide the documents requested here above, the tenderer may prove the economic and financial capacity by any other means which the SJU considers appropriate.

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

4.3.3 Technical and professional capacity

The technical and professional capacity of tenderers (the coordinator and each member of the consortium, if any), will be evaluated on the basis of the minimum requirements and evidence thereof provided as described in the subsequent paragraphs.

Reference of the last 10 assignments shall be provided by using the template developed for that purpose to be found in Annex 2.3 to these Tender specifications. The template does not need signature of the clients.

Lot 1: Strategic communications, editorial and graphic design

Minimum levels:

1. The **tenderer** shall have:
 - i) Professional experience in carrying out service assignments similar to those specified in the Lot – See Section 2.
 - ii) Knowledge of Data Protection and expertise implementing privacy friendly solutions in the field of Lot 1;
 - iii) Necessary profiles to perform the contract in line with best professional practice including:
 - ii.1 One **contract manager**, as referred to in Section 2.6.1 of these Tender specifications, with at least 10 years' professional experience in the field (5 of which in the role concerned) (project/ account management) which will be appointed as contact point for the SJU.
 - ii.2 At least one **communications strategist**, with at least 10 years' professional experience in developing strategic communications (5 of which in the role concerned).
 - ii.3 At least one **graphic designer**, with at least 5 years' professional experience (2 of which in the role concerned) in the field relevant experience in graphic creation and visual communications.
 - ii.4 At least one **copywriter/editor**, with at least 5 years' professional experience (2 of which in the role concerned) in generating compelling and persuasive content in a communication context. This profile should also provide proofreading support.

- ii.5 At least one **researcher**, with at least 5 years' professional experience (2 of which in the role concerned) in managing research in a communication context (understanding audiences and challenges, testing messages and products, gathering data for impact assessment etc.)
- ii.6 At least one of the members of the team shall have at least 2 years of experience implementing privacy and data protection principles;

All team members should native-level or equivalent of English (spoken and written).

Lot 2: Digital communications

Minimum levels:

The **tenderer** shall have:

- i) Professional experience in carrying out service assignments similar to those specified in the Lot – See Section 2.
- ii) Knowledge of Data Protection and expertise implementing privacy friendly solution in the field of Lot 2;
- iii) Necessary human resources to perform the contract in line with best professional practice, including:
 - ii.1 One **contract manager**, as referred to in Section 2.6.1 of these Tender specifications, with at least 10 years' professional experience in the field of project/account management (5 of which in the role concerned) which will be appointed as contact point for the SJU.
 - ii.2 At least one **video/animation producer/director**, with at least 10 years' professional experience in the field (5 of which in the role concerned) relevant experience in producing short animations (teasers) and videos.
 - ii.3 At least one **scriptwriter/editor**, with at least 5 years' professional experience (2 of which in the role concerned) in the field in generating compelling and persuasive animation and video scripts.
 - ii.4 At least one **graphic designer**, with at least 5 years' professional experience (2 of which in the role concerned) of experience and creative skills in art and design to communicate a story, message or idea.
 - ii.5 At least one **video editor**, with at least 5 years' professional experience (2 of which in the role concerned) in in sound recording and mixing (post-production).
 - ii.6 At least one **sound engineer**, with at least 5 years' professional experience (2 of which in the role concerned) in sound recording and mixing (post-production).
 - ii.7 At least one **web designer** with at least 5 years' professional experience (2 of which in the role concerned) in designing and creating web-based material.
 - ii.8 At least one **multimedia developer** with at least 5 years' professional experience (2 of which in the role concerned) in designing and creating multimedia files and mobile applications.
 - ii.9 At least one of the members of the team shall have at least 2 years' professional experience implementing privacy and data protection principles;

All team members should native-level or equivalent of English (spoken and written).

Lot 3: Events communications

Minimum levels:

The **tenderer** shall have:

- i) Professional experience in carrying out service assignments similar to those specified in the Lot – See Section 2.
- ii) Knowledge of Data Protection and expertise implementing privacy friendly solution in the field of Lot 3;
- iii) Necessary human resources to perform the contract in line with best professional practice, including:
 - ii.1 One **contract manager**, as referred to in Section 2.6.1 of these Tender specifications, with at least 10 years' professional experience in the field (5 of which in the role concerned) relevant experience (project/account management) which will be appointed as contact point for the SJU.
 - ii.2 At least one **events' organiser**, with at least 10 years' professional experience (5 of which in the role concerned) in the field of management of all aspects related to the organisation of events, as described in Section 2.2.3.
 - ii.3 At least one **graphic designer**, with at least 5 years' professional experience (2 of which in the role concerned) in graphic creation for events communications.
 - ii.4 **Photographer**, with at least 5 years' professional experience (2 of which in the role concerned) of relevant experience.
 - ii.5 At least one of the members of the team shall have at least 2 years of experience implementing privacy and data protection principles;

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), main current activities, and formal qualification in its possession.
- ii) References of at least ten assignments, each one invoiced over EUR 10.000,00. The provision of services directly relevant to the tender submitted must have been provided within the last three years. The list (a template is to be found in [Annex 3](#)) must include the amount, date and public or private recipients of the services.

2. For the **contract manager/project leader/account manager** and other **team members**

- i) Completed staff form to be found in Annex 6;
- ii) Detailed CVs (only), using the Europass format, of the persons who will be responsible for carrying out the tasks

4.4 Minimum requirements

The evaluation committee will check the technical tender form for compliance with the minimum requirements set out in the technical specifications.

Any tender which departs from the requirements set out in the tender specifications or which fails to meet all those requirements may be rejected on the grounds of non-compliance with the tender specifications and will not be evaluated.

The tender shall be in compliance with the legislation applicable in the field as well as with applicable environmental, social and labour law obligations established by Union law, national legislation, collective agreements or the international environmental, social and labour law conventions listed in Annex X to the Directive 2014/24 EU. The tenderer will declare in the Declaration on Honour on Exclusion Criteria and Selection criteria (Annex 1) being compliant with these requirements.

The tender shall also be in compliance with applicable legislation on protection of natural persons with regard to the processing of personal data and in particular with Regulation (EU) 2016/679 (EU GDPR).

All compliant tenders will be evaluated according to the award method described below.

Evidence to be provided:

Relevant section of the Declaration on honour (see Annex 1).

4.5 Assessment in the light of award criteria

Only the tenders which meet 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 on the basis of the economically most advantageous tender as detailed in the subsequent sections.

4.5.1 Evaluation of the award criteria (quality of the offer)

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

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

NB: Cases in a tender will be scored below the minimum required:

- Tenders presenting a mere repetition of the tender specifications or source documentation.
- Failure to submit case study/ies.

Award Criteria	Maximum available
<p>Organisational aspects:</p> <ul style="list-style-type: none"> - Adequacy of the proposed tenderer's structure and alignment to above described requirements; - Suitability of the composition and balance of the proposed team; - Suitability of the proposed resources assigned to each service and activity in terms of skills and proposed material. 	15
<p>Consistency of the proposal in respect of the services requested :</p> <ul style="list-style-type: none"> - The extent to which the services and approach proposed meets SJU's above described objectives. 	20
<p>Analysis of the case study per lot (see Annex 4)</p> <ul style="list-style-type: none"> - Understanding of the requirements; - Appropriateness of the solutions and approach proposed; - Timeline. 	35
<p>Quality assurance of contract management</p> <ul style="list-style-type: none"> - Continuity of services - Timely response and delivery - Quality of services - Compliance with data protection - Approach to sustainable procurement 	30
<p>Score Award Criteria</p>	100

4.5.2 Financial evaluation and recommendation for award

Annex 5 (Financial offer annexed to these Tender specifications) is aimed at drafting a hypothetical scenario on the basis of the profiles/items most frequently ordered by the SJU over the last 4 years. The price that will be taken into account for the financial evaluation and the award of the Contract is the “Total price/Year” indicated under the relevant Lot of Annex 5. The “Total price/Year” is the result of the sum of the various “Total price per Item per Year”, in accordance with the Invitation to tender ref. SJU/LC/0148-CFT. The “Total price/Year” represents the actual financial offer based on the hypothetical SJU’s needs in one year.

It is compulsory to fill-in all the unlocked cells of the relevant Lot of Annex 5 in order to guarantee that the evaluation of all of the tenders is based on homogenous elements in full compliance with the equal treatment principles. In case the financial offer is incomplete, the offer will be disqualified.

The list of Profiles/Items indicated in Annex 5 is not exhaustive. The SJU reserves the right to ask the contractor to provide services/profiles/items not expressly listed therein.

The formula that will be used to rank the tenders incorporates the following elements:

Quality (60%)

- the score of the award criteria of the tender
- the highest score of the award criteria among acceptable tenders

Price (40%)

- the ‘Total Price/Year’ of the tender
- the ‘Total Price/Year’ of the lowest priced acceptable tender

The ranking of the tenders, for the award of the contract, will be established by using the formula below.

Score tender Y =

$$[(\text{Score of the award criteria of tender Y} / \text{highest score of the award criteria among acceptable tenders}) \times 60\%] + (\text{‘Total Price/Year’ of the lowest priced acceptable tender} / \text{‘Total Price/Year’ of tender Y}) \times 40\%] * 100$$

5. ANNEXES

ANNEX 1 – Declaration of honour

ANNEX 2 – Template of consortium coordinator

ANNEX 3 – List of project

ANNEX 4 – Case Studies for Lots 1, 2 and 3

ANNEX 5 – Financial offer form

ANNEX 6 – Staff form