



Specifications annexed to Invitation to Tender

Ref. SJU/LC/0123-CFT

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

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

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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.

1.2 The SESAR project

The Single European Sky Air Traffic Management Research and Development (“SESAR”) project aims to modernise the air traffic management (ATM) in Europe and represents the technological pillar of the Single European Sky (SES). It aims to provide the Union with a high performance air traffic control infrastructure which will enable the safe and environmentally friendly development of air transport.

The SESAR project comprises three interrelated, continuous and evolving collaborative processes: the definition of the content and priorities, the development of new technological systems, components and operational procedures of the SESAR concept and the deployment plans of the next generation of ATM systems contributing to the achievement of the SES performance targets.

1.3 The SESAR Joint Undertaking

1.3.1 Purpose of the SESAR Joint Undertaking

The SJU was set up by Regulation (EC) No 219/2007 of 27 February 2007, for the purpose of managing the activities of the development process of the SESAR Programme under the European Union’s 2007-2013 financial perspectives. The SESAR Joint Undertaking (“SJU”), was established under Council Regulation (EC) 219/2007 of 27 February 2007, Regulations as modified by Council Regulation (EC) 1361/2008 (SJU Regulation) and last amended by the Council Regulation (EC) 721/2014 of 16 June 2014. The SJU is henceforth responsible for “carrying out specific activities aimed at modernising the European air traffic management system by coordinating and concentrating all relevant research and development efforts in the Community”.

1.3.2 Objectives and scope of the 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 and SESAR experts.

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

- 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.

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

1.4 Purpose of this call for tender

In order to continue to produce quality communications content both online and offline, the SJU is launching a call for tender to provide the SJU with a framework contract for the provision of a range of services for strategic and editorial support, graphic design, digital communications and events.

Upon the condition of having received enough compliant tenders, the SJU may decide to sign up to nine contracts, so as to enable the cascade system as far as possible (see section 3 below for further information on implementation of the contract).

This document constitutes the tender/technical 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 Framework Service Contract(s) and may be requested (as detailed in Section 2) and the evaluation procedure on the basis of the exclusion, selection and award criteria (as detailed in Section 4).

1.5 Indicative timetable

Milestone	Indicative date
Dispatch of the contract notice to the Official Journal of the EU	03 November 2015
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	07 January 2016
Notification of award	Beginning of February 2016
Contract signature	End of February 2016

2 TECHNICAL SPECIFICATIONS

2.1 Objective and scope

The objective of this invitation to tender is to provide the SJU with external support 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 the framework contract must be delivered to the SJU in a format that enables it to disseminate it by whichever means it deems best and to use the content in whichever communications campaign it deems most appropriate in the context of its communications strategy.

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) service contracts 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 Section 4 for a description of the case study per lot).

2.2 Description of services

The future Contractor shall provide the services described in the present section. It should be noted that subcontracting is allowed subject to the conditions set in point 18 of the Letter of Invitation to Tender.

2.2.1 Lot 1: Strategic communications, editorial and graphic design

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 the SJU's online communications channels (website and social media) and in printed format at events and through mailing distributions. In 2014, the SJU produced three major hard print publications, three magazines as well as three smaller brochures: all SJU publications and content are available on the SJU website www.sesarju.eu.

SJU normally only produces material in English, however on occasion has produced brochures in the 5 other ICAO languages (French, Spanish, Chinese, Arabic and Russian).

The work which may be required under this Lot involves 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. In this context, the SJU might at any moment seek advice from the Future Contractor in relation to the services described below and innovative ways of approaching its target groups.

The work may include the following services (the list is not exhaustive):

2.2.1.1 Strategic communications

- Developing communications strategies, identifying and mapping target audiences (for example, general public, ATM experts, policy makers, press and media) and identifying their needs, 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.

2.2.1.2 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;
- 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 should respect the EU Interinstitutional Style Guide, as well as the 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.

2.2.1.3 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 (Adobe InDesign, Illustrator and Photoshop, press and web optimized 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 future communications actions.

2.2.1.4 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.

2.2.2 Lot 2: Digital communications

The SJU develops a range of digital communications to support its strategic communications objectives. These may include short animations, videos, prezis, 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 the 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 website is hosted by an external service provider. Digital communications is also disseminated through the 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, Flickr and Slideshare. Additional platforms may be targeted in the future.

The work which may be required under this Lot involves the strategic conception of digital communications strategies, electronic and web-based material, audio-visual products and mobile applications. In this context, the SJU might at any moment seek advice from the future Contractor in relation to the services described below and innovative ways of approaching its target audiences. In 2014, the SJU produced three films and four short animations, among other digital communications: All SJU digital content is available through the SJU website: www.sesarju.eu.

As background information, the SJU already has a service contract in place for the hosting and maintenance of the SJU website, as well as the development and distribution of SESAR e-news. This Lot does not therefore 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.

The work may include the following services (the list is not exhaustive):

2.2.2.1 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;
- Identifying target audiences and their needs, giving advice on the appropriate channels (such as social media, websites and other online platforms) to be used and in designing communications campaigns.

2.2.2.2 Electronic product creation

- 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 (or Prezis), music files and podcasts.

2.2.2.3 Web based material

Given that the SJU already has a service contract in place for the hosting, maintenance and content management of the SJU website, 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.

2.2.2.4 Audio-visual media products

- Developing concepts, ideas, scripts and storylines for audio-visual productions to imaginatively and effectively describe the work of the SJU, including technical aspects;
- 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.

2.2.2.5 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).

2.2.2.6 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.

2.2.2.7 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.

2.2.2.8 Mobile applications

- Creating mobile applications for the most common mobile platforms, namely Google Android, iOS, Microsoft Windows Phone. 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 have to maintain the accounts or pay fees as this will be handled by the EU Publications Office.

2.2.3 Lot 3: Event communications

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

As background information, in a typical year, the SJU takes part in two major Air Traffic Management exhibitions/trade shows:

- World ATM Congress
- ATC Global

The SJU may also support ad hoc exhibitions organised by either ICAO or the European Commission on aviation-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. In addition, the SJU organises two team building events per year.

The SJU organizes a maximum of 4 events per year of up to approximately 200 participants; as an average, 1 event per year outside the EU (previous events have taken place in Beijing, Dubai, Washington, Montreal), and 3 inside the EU.

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

This Lot aims to provide the SJU with support with regards to the 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.

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

The work may include the following services (the list is not exhaustive):

2.2.3.1 Planning and logistics

- Managing participant registrations and attendance;
- 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 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;
- Organising accommodation;
- 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.

2.2.3.2 Content and material

- Creating, designing, updating and producing exhibitions stands;
- Creating, designing, updating and producing event-related material (i.e. conference packs, 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 of creative team-building activities aimed at enhancing the collaborative spirit of the 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 the SJU's social media channels.

2.2.3.3 On-site and post-event support

- Assembling and disassembling exhibition stands, including putting up and taking down banners;

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- 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 Roles and responsibilities

Future Contractors will set up a team combining all the know-how and experience necessary to carry out the tasks described in these specifications. 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 future Contractor must inform the SJU of any changes (departures, arrivals, promotions, etc.) in the composition of the team during the performance of the contract. He/she must ensure that the composition of the team complies with the present tender specifications throughout the full duration of the contract including providing an appropriate back-up person in case of absences. The future 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 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.

2.3.1 Contract 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 contract and related project activities, including among others:

- Liaising with other future 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.

2.3.2 Team members

For each Lot, a **project leader** (account manager) should be assigned to manage Lot assignments and respond to SJU requests. The project leader should participate in progress meetings with the SJU and contribute to the reporting duties for the Lot activities.

Selected **team members** should have the necessary qualifications to carry out the activities described in Section 2.2 - See section 4.3.3 for more details of the required technical capacity.

3 INFORMATION ABOUT THE CONTRACT/S

3.1 Nature

The contract to be concluded is a **multiple framework contract** with a maximum of three economic operators.

In submitting a tender, the tenderer accepts all terms and conditions specified in the invitation to tender, the present tender specification and 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 Annex 6, Article I.2.5 of the draft contract).

The estimated date of start of the activities is 6 months after the launch of this procedure.

3.3 Value/volume

It is expected that approximately up to three specific contracts per Lot per year will be given to the selected future Contractor(s). NB: This figure is in no way binding on the SJU.

The maximum allocated budget for the contract(s) is estimated at **89**00,000 EUR¹ (VAT excluded) for the total maximum duration of the contract(s).

The indicative amount per Lot would be:

- LOT 1: EUR 200 000,00
- LOT 2: EUR 280 000,00
- LOT 3: EUR 420 000,00

3.4 Implementation of the contract

The **multiple framework service contract(s) in cascade** to be placed will be implemented through **specific contracts** according to the template annexed to the draft contract attached to the invitation to tender.

The cascading mechanism consists in a rank of the tenderers in descending order with a view to establishing the list of future Contractors and the sequence in which they will be requested to submit a specific offer. The following rules shall apply:

- (1) As the need for support arises, the SJU shall submit a request for services describing the services to be procured, 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 the SJU's request for services within the deadline set.
- (2) When launching a request for services, the SJU shall initially address the future Contractor who has been nominated in first place on the basis of the results of the evaluation of this call for tenders. If this first future Contractor is in a position to meet the criteria for response time and fulfil the specifications, then he shall be awarded the specific contract in question.
- (3) If the first future Contractor is unable to meet either of these criteria, then he shall be regarded as being unavailable. In this case, the SJU shall then address the same request to the future

¹ Article 134 (1) e) and f) of the Rules of Application, 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, applies to this procedure.

Contractor who has been nominated in the second place on the basis of the results of the evaluation of the call for tenders cited in the Contract. If this second future Contractor is in a position to meet the criteria for response time and specifications, then he shall be awarded the specific contract in question.

(4) If this second future Contractor is unable to meet either of these criteria, then he shall be considered unavailable. In that event, the SJU shall then repeat this process with the future Contractor who has been nominated in third place.

(5) This process will terminate either with the award of the specific contract in question to one of the future Contractors who has been nominated, or with the failure to award the specific contract to any future Contractor. In the event of failure the SJU may redefine the request for services or start the procedure again.

(6) The inability of the future Contractor to provide the specific services, shall not be considered to afford grounds for terminating the contract, nor shall it affect the order in which the future Contractor is to be addressed for subsequent projects.

As described in the roadmaps, in all cases the first future Contractor must be consulted first. The first future Contractor has won the market described in the call for tenders and the other future Contractors are contacted only to compensate the lack in the first future Contractor's service offering. If it arises that the main future Contractor is unable to service all requests, the cascade mechanism may apply. In this case careful documentation of all communication between the future Contractors and SJU is imperative in order to ensure a decision is transparent to all parties.

During the cascade mechanism the request for services' specifications may not change (e.g. profiles and/or technical annexes must remain the same).

3.5 Service level agreement

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.

3.5.1 Request for services

The future Contractor should submit a specific tender in response to the SJU's request for services 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 maximum total price requested for the activities in accordance with Article I.4 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.4.2 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.

See 3.5.5 for further quality assurance provision.

3.5.2 Place of performance

The services may take place anywhere in the 28 European Union territories or, exceptionally, outside these territories (see section 2.2.3).

3.5.3 Monitoring, reporting and meetings

A kick-off meeting should take place on the 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, upon the request of the SJU.

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.

3.5.4 Payment

Payments will be made on the basis of services actually provided and products actually delivered subject to acceptance of the SJU. The future Contractor shall issue a report following the completion of each specific contract, detailing the services completed and the accompanying costs. This report will accompany invoices submitted by the future Contractor upon completion of all service assignments indicated in the specific contract.

3.5.5 Quality assurance

The future Contractor will guarantee full quality control of all the services provided, in line with the requirements set out in this invitation to tender. 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.

3.6 Variants

Variants on the terms of reference are not permitted.

3.7 Intellectual Property Rights

The tenderer to be selected for award of the contract will be subject to the IPR provisions of the draft contract, to be found in Annex 6, , i.e. Articles I.8 and II.10 thereof, as well as the IPR provisions of the SJU available at <http://www.sesarju.eu/newsroom/use-sesar-trademark-and-logo>.

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.

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:

- To check on the basis of the exclusion criteria, whether the tenderer can take part in the procurement procedure;
- 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;
- 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, tenderers (coordinator, each consortium member in case of consortia and subcontractors) shall provide evidence of not being in any of the situations described in articles 106 and 107 of the Financial Regulation:

- a) be 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) have been convicted of an offence concerning professional conduct by a judgment which has the force of *res judicata*;
- c) have been guilty of grave professional misconduct proven by any means which the contracting authorities can justify ;
- d) have not 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) have 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) be 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 any information, or being declared to be in serious breach of his obligation under contract covered by the EU budget.

Evidence to be provided

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

Nota Bene:

The tenderer to (the coordinator and each member of the consortium, if any) 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 of honour (if provided in copy at the offer submission stage) and the following documentary proofs in **original** to confirm the declaration referred to above:

1. For situations described in (a), (b) and (e), production of a recent² 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.
2. For the situation described in point (d) above, recent³ 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.⁴
3. 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 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.

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

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.

² Not older than one year.

³ Not older than one year.

⁴ 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.

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 candidate or 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 at dispatch of the information for candidates and tenderers. In such cases, the candidate or 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:

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/0123-CFT).

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 reason 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.

4.3.3.1 Lot 1: Strategic communications, editorial and graphic design

Minimum requirements:

founding members



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1. The **tenderer** shall have:
 - i) Professional experience in carrying out service assignments similar to those specified in the Lot – See Section 2.
 - ii) Necessary profiles to perform the contract in line with best professional practice including:
 - ii.1 One **project leader and/or coordinator (account manager)**, with at least 10 years 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' experience in developing strategic communications (5 of which in the role concerned).
 - ii.3 At least one **graphic designer**, with at least 5 years (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 (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 (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.)
- All team members should native-level or equivalent of English (spoken and written).

4.3.3.2 Lot 2: Digital communications

Minimum requirements:

The **tenderer** shall have:

- i) Professional experience in carrying out service assignments similar to those specified in the Lot – See Section 2.
- ii) Necessary human resources to perform the contract in line with best professional practice, including:
 - ii.1 One **project leader** (account manager), with at least 10 years 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 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 (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' 5 years (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 (2 of which in the role concerned) in sound recording and mixing (post-production).
 - ii.6 At least one **sound engineer**, with at least 5 years (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 (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 (2 of which in the role concerned) in designing and creating multimedia files and mobile applications.

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

4.3.3.3 Lot 3: Events communications

Minimum requirements:

The **tenderer** shall have:

- i) Professional experience in carrying out service assignments similar to those specified in the Lot – See Section 2.
- ii) Necessary human resources to perform the contract in line with best professional practice, including:
 - ii.1 One **project leader** (account manager), with at least 10 years 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 (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 (2 of which in the role concerned) in graphic creation for events communications.
 - ii.4 **Photographer**, with at least 5 years (2 of which in the role concerned) of relevant experience.

4.3.3.4 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 **co-ordinator/project leader** and other **team members**

- i) Completed staff form to be found in Annex 53;
- ii) Detailed CVs (only), using the Europass format, of the persons who will be responsible for carrying out the tasks, ~~including mention to the certifications required above and the list of audit assignments that they have managed or in which they have participated during the last three years.~~

4.4 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.

4.4.1 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
Organisational aspects: <ul style="list-style-type: none">- Adequacy of the proposed tenderer's structure and alignment to the requirements set in Section 2.2;- 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.	20
Consistency of the proposal in respect of the services requested : <ul style="list-style-type: none">- The extent to which the services and approach proposed meets the SJU's objectives according to Sections 1.3 and 2.	25
Analysis of the case study per lot (see Annex 4) <ul style="list-style-type: none">- Understanding of the requirements;- Appropriateness of the solutions and approach proposed;- Timeline and budget.	30
Quality assurance of contract management <ul style="list-style-type: none">- Continuity of services- Timely response and delivery- Quality of services See Section 3.5	25
Score Award Criteria	100

4.4.2 Financial evaluation and recommendation for award

The price that will be taken into account for the financial evaluation and the award of the Contract, is the “Total price for necessary profiles/items” proposed by the tenderer in the financial offer as indicated in the Invitation to tender ref. SJU/LC/0123-CFT.

All tenders must contain a separate financial offer following the template attached to the tender specifications in Annex 5 and in line with the requirements detailed in section 2 above.

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’ of the tender
- the ‘Total Price’ 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 =

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

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 – Draft contract