



# **Tender Documents**

**Publication Reference: S2R.17.OP.01**

**Title of Contract: Provision of strategic communications, editorial support, graphical, digital and events-related communications services**

The Shift2Rail Joint Undertaking (hereinafter “the S2R JU”, “the Joint Undertaking” or “the Contracting Authority”) is planning to award public contract/contracts for provision of the services referred to above

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# 1 INTRODUCTION

## 1.1 Acronyms and terminology

<b>AWP</b>	The S2R JU Annual Work Plan available at: <a href="http://shift2rail.org/about-shift2rail/reference-documents/">http://shift2rail.org/about-shift2rail/reference-documents/</a>
<b>DG MOVE</b>	Directorate-General for Mobility and Transport
<b>DG RTD</b>	Directorate-General for Research and Innovation
<b>ERA</b>	European Union Agency for Railways
<b>ERTMS</b>	European Rail Traffic Management System
<b>MAAP</b>	The S2R JU Multi-Annual Action Plan available at : <a href="http://shift2rail.org/about-shift2rail/reference-documents/">http://shift2rail.org/about-shift2rail/reference-documents/</a>
<b>MP</b>	The S2R JU Master Plan available at : <a href="http://shift2rail.org/about-shift2rail/reference-documents/">http://shift2rail.org/about-shift2rail/reference-documents/</a>
<b>MEP</b>	Member of the European Parliament
<b>PPP</b>	Public Private Partnership
<b>S2R JU</b>	Shift2Rail Joint Undertaking (hereafter referred to as the S2R JU) was established by Council Regulation (EU) n° 642/2014 of 16 June 2014. The S2R JU is a public-private partnership, providing a platform for the key stakeholders of the European rail system to work together with a view to driving innovation in the years to come by implementing a comprehensive and coordinated research and innovation strategy.

## 1.2 The S2R JU Joint Undertaking

### 1.2.1 Purpose of the S2R JU Joint Undertaking

Shift2Rail is the first European rail initiative to seek focused research and innovation (R&I) and market-driven solutions by accelerating the integration of new and advanced technologies into innovative rail product solutions. Shift2Rail promotes the competitiveness of the European rail industry and will meet changing EU transport needs. R&I carried out under this Horizon 2020 initiative will develop the necessary technology to complete the Single European Railway Area (SERA).

### 1.2.2 Objectives and scope of the S2R JU Communications activities

In order to ensure strong engagement from a wide range of stakeholders, the S2R JU believes that communications must be truly integrated into the overall framework of Shift2Rail. The overall goal of the S2R JU communications strategy is to:

- Raise awareness and outreach on the S2R Programme in order to secure stakeholders commitment;

- Promote S2R Programme as an integral part of the day-to-day railway world, leveraging on its role in making the Single European Railway Area a reality;
- Highlight the S2R Programme Innovative Solutions coming from the R&I activities realized through integrated and connected Projects.

Inter alia, the success of the S2R Programme and its results, rely also on a strong communications plan to ensure that key messages are disseminated to the main audiences of the S2R Programme:

- **Its Governance**
  - ✓ S2R JU Members
  - ✓ European Commission (DG MOVE & DG RTD)
- **Decision makers:**
  - ✓ Commissioners and High Representatives of the European Commission
  - ✓ Members of the European Parliament ITRE and TRANS Committees
  - ✓ Council of the EU (Transport and Competitiveness) and Member States individually
  - ✓ Transport Programme Committee H2020
  - ✓ Other consultation bodies at different levels
- **Stakeholders:**
  - ✓ Associations: CEN-CENELEC, CER, CLECAT, EIM, EPF, EPITTOLA, ERFA, ETF, ETSI, ET TSA, EURNEX, FEDEC, NB-Rail, SEMAF, UIC, UIP, UIRR, UITP, UNIFE, etc.
  - ✓ Industrial community
  - ✓ Scientific Community, i.e. Universities, Research Centres, etc.
  - ✓ Other agencies (ERA, GSA, ESA, FCH, other JUs, etc.)
  - ✓ European Rail Research Advisory Council (ERRAC)
- **Other policy makers:**
  - ✓ International, EU level, Member States, regional and municipal authorities, councillors and scientific attachés of Permanent Representations to the EU
- **International, European and National environmental & energy and mobility associations, NGOs, etc.**
- **General public and potential applicants**

The S2R JU targets the above-mentioned audiences through strategic online communications (website and social media) as well as offline (printed material), events and the media.

### 1.3 Purpose of this call for tender

In order to produce quality communications content both online and offline, the S2R JU is launching a call for tender to provide the S2R JU with up to four framework contracts for the provision of a range of services for strategic and editorial support, graphic design, digital communications and events, web hosting & maintenance.

This document constitutes the tender/technical specifications accompanying the S2R JU'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 S2R JU 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).

### 1.4 Indicative timetable

Milestone	Date
<b>Dispatch of the contract notice to the Official Journal of the EU</b>	<b>22 January 2017</b>
Deadline for requesting additional information/clarification from the S2R JU	No later than 9 calendar days before the closing date for submission of tenders
Last date on which clarifications are issued by S2R JU	No later than 5 calendar days before the closing date for submission of tenders
<b>Deadline for submission of tenders</b>	<b>15 March 2017</b> Tenders delivered by hand should be submitted not later than <b>17:00h Brussels time</b>
Opening Session	<b>22 March 2017 at 11:00 AM, Brussels time</b> Maximum one legal representative per participating tenderer may attend the opening session. Tenderers shall inform the Joint Undertaking of their intention to attend, at least 5 working days prior to the opening session.
Notification of award	<b>Middle of April 2017</b>
<b>Contract signature</b>	<b>End of April 2017</b>

## 2 TECHNICAL SPECIFICATIONS

### 2.1 Objective and scope

The objective of this invitation to tender is to provide the S2R JU with external support related to strategic communications, editorial support and graphic design, digital communications and events as well as to web hosting and maintenance. All content created under the terms of the specific contracts linked to the S2R JU framework contract must be delivered to the S2R JU 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 S2R JU is launching an open call for tender divided into 4 (four) lots aimed at concluding a maximum of 4 (four) framework contracts for the following services:

- Lot 1: Strategic communications, editorial support and graphic design
- Lot 2: Digital communications
- Lot 3: Event communications
- Lot 4: Web hosting & website maintenance

The same economic operator may submit a tender for one, two, three or all four Lots. Given the size and structure of the S2R JU, for the sake of optimal contract management and increased efficiency, economic operators capable of submitting a tender in response to several/all lots are highly encouraged to do so.

For Lots 1, 2 & 3, each tender submitted should include a case study. The case studies are described in ANNEX 4.

## 2.2 Description of services

The tenderer shall provide the services described in the present section. Subcontracting is permitted. The S2R JU shall be understood as the Joint Undertaking, all the activities performed under the S2R Programme and any relevant activity in connection with the implementation of the S2R Regulation<sup>1</sup>.

### 2.2.1 Lot 1: Strategic communications, editorial and graphic design

The S2R JU publishes written communications material, such as brochures, factsheets, reports, posters, press releases, planning documents, info graphics and branding material. In preparing this material, the S2R JU 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 S2R JU's online communications channels (website and social media) and in printed format at events and through mailing distributions. So far, the S2R JU has published a limited number of publications such as the S2R Master Plan (MP), the Multi-Annual Action Plan (MAAP), the Annual Work Plan (AWP), Annual Reports, and factsheets. All S2R JU publications and content are available on the S2R JU website <http://shift2rail.org/>.

Currently, the S2R JU only produces material in English.

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 S2R JU. In this context, the S2R JU 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):

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<sup>1</sup> Council Regulation (EU) No 642/2014 of 16 June 2014 establishing the Shift2Rail Joint Undertaking.

### 2.2.1.1 Strategic communications

- Developing specific communications strategies, identifying and mapping target audiences (for example, general public, Rail experts, policy makers, press and media) and 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 transport and rail experts, and the scientific and academic communities;
- 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 S2R JU'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 a set of guidelines for the visual and corporate identity of the S2R JU;
- Creating artwork such as drawings, illustrations, visuals in accordance with the S2R JU 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) ad hoc turnaround of limited print runs of information products;
- Dispatching and transporting printed material Europe-wide and occasionally outside of the EU;
- 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 S2R JU 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 S2R JU the source files, photos and fonts used so that these can be re-used in the same form or in a modified form in future communications actions.

#### **2.2.1.4 Branding material**

- Proposing branding material according to the scope of the S2R JU'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 S2R JU 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 S2R JU's website (currently WordPress platform), which attracts 7 253 monthly visits, with a month on month increase rate of 0.5%. Within the website, particular attention is paid to communicating S2R JU's approach and achievements to targeted audiences. The website is hosted by an external service provider. Digital communications will also be disseminated through the S2R JU's e-newsletters, as well as ad-hoc mail shots and event invitations. In terms of social media, the S2R JU is currently active on Twitter and LinkedIn. Additional platforms may be targeted in the future such as YouTube, Flickr and Slideshare. A Facebook page currently dormant already exists.

The S2R JU's public website is the main communications tool and prime channel of information for the stakeholders that the S2R JU aims to reach:

- Current S2R JU membership base
- Members, partners, associate partners, and S2R JU staff
- Stakeholders of S2R
- Other EU institutions and other active rail professionals
- Media
- Railway, European affairs and environmental specialists
- General public, specifically rail passenger

The S2R JU website seeks to be an exemplary model of website design, user-friendliness and innovation. Within the website, particular attention is paid to communicating S2R Programme's approach and achievements to targeted audiences, through animations, graphics and videos. The website is hosted by an external service provider. The website also has a Members Area which acts as a restricted area with a document repository for S2R JU Members as well as linking to mini-sites hosting project deliverables, currently under construction

In addition to the website, the S2R JU intends to run and maintain an Intranet on WordPress, accessible only to S2R JU staff in the coming months, with access for staff at work and remotely.

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 S2R JU 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. The future contractor may be required to animate the social media accounts (for example: Twitter platform and LinkedIn pages) regularly.

As background information, the S2R JU already has a service contract in place for the hosting and maintenance of the S2R JU website. 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 S2R JU or the direct provision of these services.

Lot 2 and Lot 4 are therefore connected. The contractor will be expected to provide consulting to ensure synergies between the content and the web hosting company.

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 S2R JU for the conception of digital communication strategies in the field of multimedia and web services using the latest trends in digital communication;
- 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 Web Design**

- The contractor is expected to take responsibility for the design and management of the website. The first internal assumption is to develop the site in Drupal, however the S2R JU is open to other solutions;
- Creating new areas in the website for specific promotional campaigns, such as large S2R events or the S2R MAAP;
- Maintaining web pages, converting and formatting images and other graphical resources into banners for the website and intranet;
- Creating, publishing and managing online polls and surveys;
- Publishing events announcements, news, calls and other new content;
- Adding documents and maintaining the publications library;
- Selecting, editing and publishing photos and images;
- Identifying videos and multimedia material from S2R JU partners to enrich the S2R website;
- Cross referencing with partner's sites;
- Maintaining the image library for the website and intranet;
- Updating and maintaining contact lists within the JU's email marketing tool (to be selected), importing contacts, dealing with spam and bouncing addresses;
- Providing detailed web analytics and a monthly report analysing the user audience, usage of the site with recommendations for improvements to the site and content in order to maximise its impact;
- Alerting S2R JU when services requested go beyond the scope of the contract and proposing solutions that would meet the S2R JU needs in terms of budget and scope;
- Removing obsolete and outdated information;
- Managing user access to the website;

- Conducting quality control of the website, media platform and social media channels;
- Coordinate, with other contractors the development and evolutive maintenance of digital products and services (web, mobile app, intranet, extranet, e-news...);

### **2.2.2.3 Web maintenance and development of web based material**

The S2R JU already has a service contract in place for the hosting which, at its end, will be covered by Lot 4. Maintenance and content management of the S2R JU website, web services related to this framework contract should include:

- Maintaining the CMS application, installing new releases or patches, and resolving bugs and incidents as they arise;
- If requested by S2R JU, identification of another CMS, installation, configuration, development of the necessary functionalities and visual elements and migration of data
- Maintaining content types, views and other WordPress elements;
- Upon request from S2R JU, modifying parts of the web site or developing and implementing new functionalities, including interfacing with other websites such as the S2R JU cooperation tool
- Improving site architecture and navigation, such as maintaining the LAMP stack (Linux, Apache, MySQL and PHP) and cache management (e.g.Vanish);
- Ensuring the optimal referencing by search engines;
- Designing and creating HTML tools. These can be interactive tools either for use on the S2R JU website or other relevant websites;
- Designing, creating and implementing web pages including related metadata and links, mini websites or micro sites. For example, a website created for a specific event or project;
- Designing and creating products for the internet (responsive web design), involving the creation and development and testing of the concept, script, structure and content, developing ergonomic interfaces, e-learning tools, html interfaces, digital illustrations, animations, website banners, computer and online simulations and educational games, animated presentations (or Prezis), audio files and podcasts.
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- It should be noted that these websites will be hosted by the current provider or via Lot 4 contractor.

### **2.2.2.4 Audio-visual media products and services**

- Developing concepts, ideas, scripts and storylines for audio-visual productions to imaginatively and effectively describe the work of the S2R JU, 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 S2R JU members, partners or external stakeholders. In addition, the future Contractor will make available to the S2R JU the masters of the edited material, raw footage and full rushes of the audio-visual products, indicating copyright clearances.
- 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).
- 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 submit
- more productions for additional communication activities - The future Contractor will need to obtain and respect the copyright clearance of any pre-existing material.
- Making available to the S2R JU 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.

#### **2.2.2.5 Mobile applications**

- Creating mobile applications, preferably based on COTS (Commercial Off the Shelf) products for the most common mobile platforms, namely Google Android, iOS, Microsoft Windows Phone. The future Contractor must also provide training to allow the S2R JU staff to create and fully manage events (agenda, participants, exhibitors, interactivity, etc) ;

- After implementation of the solution, the S2R JU 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.

### 2.2.3 Lot 3: Event communications

The S2R JU is and will be responsible for the organisation of internal and external events, including team (members, staff, etc) 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.

Shift2Rail will organise, together with other JU's, an exhibition to be held at the second plenary session of the European Parliament (23-26 October 2017, in Strasbourg).

Shift2Rail will also actively take part in two major events in 2018 for which preparations must start in 2017.

- Transport Research Area (TRA) congress, A Digital Era for Transport - Vienna - 6-19 April 2018 + S2R Prize Awards  
<http://www.smart-mobility.at/en/tra2018/>
- InnoTrans - Berlin - 18-21 September 2018  
<http://www.innotrans.de/>

The S2R JU may also support ad hoc exhibitions organised by its members and/or stakeholders. The S2R JU also organises a separate Information Day for Non-Members to inform on the latest call for proposals (next Info Day in December 2017).

Indicatively, the S2R JU organizes 1 event per year in Brussels of up to approximately 500 participants, and 3 others in other Member States.

This Lot aims to provide the S2R JU 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 S2R JU has a presence are available on the S2R JU website [www.shift2rail.org](http://www.shift2rail.org)

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

#### 2.2.3.1 Planning and logistics

- Managing participant registrations and attendance;
- 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 S2R JU 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, promotional material, 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 S2R JU visual identity;
- Dispatching or transporting (by land, by sea or by plane) communications material for events;
- Managing virtual events, such as webinars or online tutorials, and combining the dissemination of presentations with interactive services such as chat using the S2R JU'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;
- 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.).

## 2.2.4 Lot 4: Web site hosting & website maintenance and content management

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

### 2.2.4.1 Website hosting

- Managing the hosting of the S2R JU website and intranet, which entails the following:
  - Delivery of a reliable cloud hosting service (e.g. PaaS platform or IaaS in the S2R JU structure)
  - Definition and delivery appropriate SLA such as availability, downtime, backup/restore, disaster recovery, load balancing, storage, bandwidth, resolution time, performances and helpdesk;

- Provision of a hosting environment including monitoring service;
- Securing the site and ensuring protection from attacks such as denial of service;
- Coordination with current hosting organisation or web site maintenance organisation to ensure a smooth migration to the new hosting environment, including related actions such as DNS change, search engine re-indexation;
- Ensure synergies with the content management contractor to deliver a seamless performance.
- Liaising with other contractors to ensure coherent planning for online management and development, for example with contractors responsible for email and media monitoring platforms and Intranet re-development (SharePoint).

#### 2.2.4.2 Website maintenance services

- The web site and its evolution should be compliant with the latest web and accessibility standards, and existing browsers and platforms, ideally compliant with DG COMMS IPG guidelines for websites;
- The CMS system and other web applications and databases shall be preferably Open Source software with GPL, GNU or equivalent licences; proprietary software could also be envisaged. The contractor is expected to provide guidance on the solutions to offer the best support for the level on content;
- The website and its applications should be responsive on multiple platforms – cross browser tablets and smartphones.

#### 2.2.4.3 Availability

**Definition:** Measures the availability of the Web-hosted application. This provides the service recipient with the percentage of time that the application(s) were available for use in a specific month.

Requirement	24 hours per day, 7 days per week (365 days a year)
Measurement Range	Low = 99.8%; High = 99.999%
Compliance	Maintain Web-hosting application availability in good working order so that service recipient and client activities can take place within defined time frames.
Measurement Frequency	Monthly
Calculation Formula	Total available hours/by total hours (less scheduled maintenance hours) in measurement period. Each server x 24 hours x 21.16 days (average work days in a month) = "Monthly Available" to define if "Service Level Attained"

#### 2.2.4.4 Response Time

**Definition:** Measures the time taken to refresh the screen with requested information after the request is entered.

Requirement	24 hours per day, 7 days per week (365 days a year)
Measurement Range	Low = Page load target within 5 seconds; High = Page load target within 1 second;
Compliance	Maintain Web-hosting applications availability in good working order so that service recipient and client activities can take place within defined time frames.
Frequency	Monthly
Calculation Formula	Response Time: <Y seconds. Formula: Time it takes for all elements to appear on an end-user screen from inquiry request initiation

**NOTE:** The response time is also dependant in the way the web application is structured. In case web pages take longer to load then the measurement range maybe adjusted accordingly following agreement between the S2R JU and the Contractor.

#### 2.2.4.5 Backup and Recovery

**Definition:** Perform incremental backups (including of the access logs for web statistics) on a daily, weekly and monthly basis as required by the organization.

Requirement	24 hours per day, 7 days per week (365 days a year)
Measurement Range	Low = 99% of the time; High = 99.99% of the time.
Compliance	Perform daily backup, maintain minimum 7 daily cycles, 6 weekly, 13 monthly. Perform one recovery test per year upon the S2R JU's request.
Frequency	Monthly

Calculation Formula	Confirm backup/recovery from backup/recovery logs
Data Sources	Provide reporting of the back-up functions including date and time-stamp capabilities and status.

#### 2.2.4.6 Service Availability

**Definition:** The percentage of time that the server is available for normal business operations.

Requirement	24 hours per day, 7 days per week (365 days a year)
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#### 2.2.4.7 Security

The contractor will provide full description of security measures taken to protect the applications and the data from intentional or accidental damage and from unauthorised access, such as:

- Server security management
- Protection from denial of service attacks
- Timely application of security patches
- Anti-virus to ensure protection from documents coming from users
- Human error reduction

The contractor must ensure that the latest patches and operating system updates are performed to ensure security. In case there are incidents where security breaches are suspected then the S2R JU should be informed.

#### 2.2.4.8 Restore times

The service restore time is the time needed by the contractor to provide a solution to restore the service. During normal working hours (08:30 - 17:30) (Central European Time), the following reaction times are expected.

Item	Response times
Critical	90% within 1 hour, 10% within 2 hours
Urgent	95% within 2 hours, 5% within 4 hours
Normal	95% within 4 hours, 5% within 6 hours

The tenderer should provide estimates for exceptional requests outside the normal working hours (as defined above).

#### 2.2.4.9 Web Hosting environment services

The following specifications should be provided for any of the above listed types of web hosting environments: shared hosting, virtual dedicated servers and dedicated hosting.



For the standard hosting services and management of daily operations both a Production environment and a Staging environment are required. The Production environment hosts the applications (see Section 4.1 for list of applications) as described below.

Tenderers should provide a diagram of both Production and Staging environments, showing all machines, software installed and network connections

The performance of the staging environments should not match the one of the production as access to it will be limited to web team members and the contractors that develop and maintain the applications. Therefore, it should be kept to the minimum.

#### **2.2.4.10 Standard Hosting services - Production environment**

The standard hosting services for Production are as follows:

Provision of:

- High availability hardware
- Disc space enough to cover the needs of the website
- UPS power backups
- Tape back-up service or other back-up service;
- Connection via:
  - o HTTPS access to the hosted applications
  - o FTP (or sFTP) access to the hosted applications and environment
  - o SSH connection

These connections should allow remote access to the hosting environment which is necessary for application deployments, patches or running SQL scripts etc. A close collaboration with other THE S2R JU Contractors developing and maintaining the web applications is required.

- SSL support and provision of SSL certificates as needed
- Guaranteed direct connection to a major internet backbone is required. An estimated bandwidth of 90-100GB/month is expected
- Streaming audio and video capabilities

The tenderers should describe how they will maintain, check, monitor and report on the services requested. This includes the allocation of human resources, description of all hardware and software used.

The table below shows the resources currently required by the applications on the existing Production environment.

Application	Size	Database size
New WCM/website	2.9 GB	1.7 GB
Infoportal	1.8 GB	6.0 GB
e-Recruitment	3.7 GB	25.0 GB
Survey software	79.0 MB	7.8 MB
Statistics software	24 MB	NA
Old WCM	3.7 GB	25.0 GB
Other (static mini-sites etc)	31.0 GB	-

NA = not available

#### 2.2.4.11 Standard Hosting services - Staging environment

The purpose of the Staging environment is to allow the S2R JU to test new software, enhancements to the existing systems, etc. The S2R JU will specify which of the applications on the Production environment should also be on the Staging. The applications on the Staging environment (including all content) should be synchronised regularly with the Production environment so that Staging reflects Production as closely as possible.

The minimum hosting services for Staging are as follows:

Provision of:

- Disc space as needed to mirror production
- UPS power backups
- Tape back-up service or other back-up service;
- Connection via:
  - o HTTPS access to the hosted applications
  - o FTP (or sFTP) access to the hosted applications and environment
  - o SSH connection

These connections should allow remote access to the hosting environment which is necessary for application deployments, patches or running SQL scripts etc. A close collaboration with other S2R JU Contractors developing and maintaining the web applications is required.

The tenderers should describe how they will maintain, check, monitor and report on the services requested. This includes the allocation of human resources, description of all hardware and software used.

#### 2.2.4.12 Support

The contractor should provide the necessary support and ensure that the following types of changes are addressed, if requested by the S2R JU.

It is expected that the following types of changes maybe requested by the S2R JU:

- Standard change
- Complex change
- Emergency change

The implementation time is the elapsed time between the assignment of the change request to the contractor and the closing of the change request. The service offered will be evaluated on a monthly basis. It is expected that the:

- The maximum implementation time (during working hours) for a standard simple change: 2 hours.
- The maximum implementation time (during working hours) for a complex change is: 8 hours.
- The maximum implementation time (24h/24h 7days/week) for an emergency change: 3 hours.

#### **2.2.4.13 Take-over and hand-over of existing web-applications**

The S2R JU may request the take-over and hand-over of the existing web applications from the current web application hosting provider and installation to the tenderer's hosting environment.

The S2R JU will provide the necessary web-application documentation including installation manuals for the take-over.

The contractor should provide a detailed plan describing how it plans the take-over to ensure a smooth continuation of service. This activity includes the hosting environment preparation and not installation of the application that will be performed by another party.

For a hand-over, the contractor shall describe how documentation will be prepared and the hand over will be organised.

### **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 S2R JU 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 S2R JU 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 S2R JU 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 S2R JU 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 S2R JU requests;
- Participating in progress meetings with the S2R JU;
- 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 S2R JU requests. The project leader should participate in progress meetings with the S2R JU 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.

The proposed team members should be listed, using the team overview form made available in **ANNEX 3**.

## 3 INFORMATION ABOUT THE CONTRACTS

### 3.1 Nature

The S2R JU will conclude one or up to four framework service contracts.

In submitting a tender, the tenderer accepts all terms and conditions specified in the invitation to tender, the present tender specifications of the relevant lot(s) and the draft contract.

### 3.2 Duration

The duration of each framework contract is 12 months, which may be renewed for up to a total duration of 48 months (see Annex 7, Article I.2.5 of the draft contract).

The estimated date of start of the activities is 4 months after the launch of this procedure.

### 3.3 Value/volume

The maximum total amount foreseen for each ensuing S2R JU framework contract is:

- LOT 1: EUR 300 000,00
- LOT 2: EUR 200 000,00
- LOT 3: EUR 500 000,00
- LOT 4: EUR 200 000,00

### 3.4 Implementation of the framework contracts

A framework contract is a legal agreement between two parties - in this case, the S2R JU and the contractor. It acts as the legal basis for the possible future purchase of services/supplies by the S2R JU. The framework contract defines, amongst others, the scope of services/supplies that can be purchased, methodology for implementation, timing and fees to be respected by the contractor etc. The framework contract itself is not an order for services or supplies and does not constitute a financial commitment.

Services /supplies will be requested (i.e. ordered) under “specific contracts” (or “order forms”) linked to particular activities, over a given period.

The S2R JU intends to issue individual and successive specific contracts over the period of validity of the framework contracts and shall take the form of one of the documents provided under Annexes III.a (specific contract) and III.b (order form) to the draft framework contract (Part III of the Tender Documents). Either format may be used for implementation of the framework contract indiscriminately, depending on the S2R JU’s needs.

### **3.5 Place of Work and Delivery**

The implementation of the services will be undertaken at the contractor’s premises. When face-to-face meetings between the S2R JU and the contractor are needed, these will take place at the S2R JU’s premises in Brussels.

Where possible, meetings between the S2R JU and the contractor can be made by utilising modern technologies such as video conference systems.

### **3.6 Communication**

Communication between the tenderer and the S2R JU must be possible by phone, electronic mail, fax, normal and registered mail, and a communications solution such as video conference systems or equivalent.

### **3.7 Language**

The working language of the S2R JU is English. The English language shall be used throughout the project duration for all communication, reports and other documentation.

### **3.8 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.

#### **3.8.1 Request for services**

The future Contractor should submit a specific tender in response to the S2R JU’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 model financial offer (See Annex 6);
  - o Level of creativity, in terms of responding to the brief, proposing original ideas and capturing the strategic communications objectives of the S2R JU;
  - 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 S2R JU objectives.

See ~~3.5.5~~ 3.8.5 for further quality assurance provision.

### **3.8.2 Place of performance**

The services may take place on the territory of any European Union Member State or, exceptionally, outside these territories (see section 2.2.3).

### **3.8.3 Monitoring, reporting and meetings**

A kick-off meeting should take place on the S2R JU premises upon signature of the specific 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 S2R JU 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 S2R JU.

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 S2R JU, may be proposed by the future Contractor.

### **3.8.4 Payment**

Payments will be made on the basis of services actually provided and products actually delivered subject to acceptance of the S2R JU. The future Contractors 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.

### 3.8.5 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 S2R JU 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.

### 3.9 Variants

Variants on the terms of reference are not permitted.

### 3.10 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 7, i.e. Articles I.8 and II.10 thereof.

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

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, respectively:

- 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 the S2R JU, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the S2R JU/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 2), 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 recent<sup>2</sup> 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.

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<sup>2</sup> Not older than one year.



2. For the situation described in point (d) above, recent<sup>3</sup> 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.<sup>4</sup>
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 S2R JU may waive the obligation of a tenderer to submit the documentary evidence referred to above if such evidence has already been submitted to the S2R JU 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: <https://ec.europa.eu/growth/tools-databases/ecertis/>.

### 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.

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 S2R JU 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 S2R JU, 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:

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<sup>3</sup> Not older than one year.

<sup>4</sup> 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.

Tenderers shall provide a dully filled-in Legal entities form, including all associated supporting documentation : [http://ec.europa.eu/budget/contracts\\_grants/info\\_contracts/legal\\_entities/legal\\_entities\\_en.cfm#en](http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm#en)

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 S2R JU 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 S2R JU 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:

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 S2R JU.
    - 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 S2R JU.

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 ~~in~~ **sound recording and mixing** (post-production) **video editing**.

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.

ii.9 At least one online **content manager** with at least 10 years in managing web-based projects and managing the content

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 S2R JU.
  - 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 Lot 4: Web hosting and maintenance

##### Minimum requirements:

The **tenderer** shall produce proof of the following:

- i) The educational and professional qualifications of the service provider or contractor and/or those of the firms' managerial staff, in particular, those of the person or persons responsible for providing the services, including one dedicated **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 S2R JU. The tenderer is requested to include the CVs in Europass format:  
<https://europass.cedefop.europa.eu/documents/curriculum-vitae>
- ii) A statement of the annual average manpower and the number of managerial staff of the tenderer in the last three (3) years.
- iii) The tenderer should also submit at least 2 samples of websites hosted for other clients.

The minimum annual average manpower in the last three (3) years shall be of at least 7.

The minimum annual average managerial staff in the last three (3) years shall be of at least of 1.

#### 4.3.3.5 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 5) 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 5;

- ii) Detailed CVs (only), using the Europass format, of the persons who will be responsible for carrying out the tasks

## 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 tables below.

Tenders submitted for lots 1, 2 and 3 will be assessed against the award criteria listed in TABLE 1, below. Those submitted in response to Lot N° 4 will be assessed against the award criteria listed in TABLE 2, below.

To facilitate the assessment of tenders against the award criteria listed below, tenderers are required to submit, in their technical proposals:

For all lots:

- an exhaustive description of how they intend to fulfil each of the technical and operational requirements listed respectively in Sections 2.2.1, 2.2.2, 2.2.3 and 2.2.4;

For Lots 1, 2 and 3:

- A case study pertaining to each lot for which they intend to submit a tender, as detailed in ANNEX 4;

For Lot 4:

- No case study to be provided

For all four lots, tenders 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.

**TABLE 1 (Lots 1, 2 and 3)**

<b>Award Criteria</b>	<b>Maximum available</b>
<b>Organisational aspects:</b> <ul style="list-style-type: none"> <li>- Adequacy of the proposed tenderer's structure and alignment to the requirements set in Section 2.2;</li> <li>- Suitability of the composition and balance of the proposed team;</li> <li>- Suitability of the proposed resources assigned to each service and activity in terms of skills and proposed material.</li> </ul>	20
<b>Consistency of the proposal in respect of the services requested:</b> <ul style="list-style-type: none"> <li>- The extent to which the services and approach proposed meets the S2R JU's objectives according to Sections 1.3 and 2.</li> </ul>	25
<b>Analysis of the case study per lot (see Annex 4)</b> <ul style="list-style-type: none"> <li>- Understanding of the requirements;</li> <li>- Appropriateness of the solutions and approach proposed;</li> <li>- Timeline and budget.</li> </ul>	30
<b>Quality assurance of contract management</b> <ul style="list-style-type: none"> <li>- Continuity of services</li> <li>- Timely response and delivery</li> <li>- Quality of services</li> </ul> See Section <del>3.5</del> 3.8.5.	25
<b>Score Award Criteria</b>	<b>100</b>

**TABLE 2 (Lot 4)**

<b>Award Criteria</b>	<b>Maximum available</b>
<b>Quality of the hosting service</b> <ul style="list-style-type: none"> <li>- Management of daily operations</li> <li>- Hardware proposed</li> <li>- Available software</li> <li>- Service level</li> <li>- Securing measures</li> </ul>	70
<b>Facilities for secure administration</b> <ul style="list-style-type: none"> <li>- Service management console</li> <li>- Service level monitoring and reports</li> <li>- Options for remote access</li> </ul>	30
<b>Score Award Criteria</b>	<b>100</b>

#### 4.4.2 Financial evaluation and recommendation for award

For each lot, 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.

All tenders must contain a separate financial offer following the template attached to the tender specifications in Annex 6 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 – Tender Submission Form

ANNEX 2 – Declaration of honour

ANNEX 3 – Team Overview Form

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

ANNEX 5 – List of projects & Staff form

ANNEX 6 – Model Financial Offer

ANNEX 7 – Draft contract

ANNEX 8 – Consortium Coordinator Mandate