



# Specifications attached to the Invitation to Tender

14.CAT.OP.050

R&T FOCUS ON SATCOM

<b>Introduction to EDA .....</b>	<b>3</b>
<b>1 Overview of this tender .....</b>	<b>4</b>
1.1 Description of the contract .....	4
1.2 Timetable .....	4
1.3 Participation in the tender procedure .....	4
1.4 Participation of consortia .....	4
1.5 Sub-contracting .....	5
1.6 Presentation of the tenders .....	5
1.7 Period during which the tenders are binding .....	6
1.8 Contacts between the EDA and tenderers .....	7
1.9 Visits to EDA premises .....	7
1.10 Division into lots .....	7
1.11 Variants .....	7
1.12 Security standards .....	7
1.13 Contract provisions .....	7
<b>2 Terms of Reference .....</b>	<b>8</b>
2.1 Introduction: background of the invitation to tender .....	8
2.2 Description of the subject and scope of the contract .....	8
2.3 Characteristics of the required deliverables .....	9
2.4 Volume of the contract .....	10
2.5 Duration of the contract .....	10
2.6 Place of delivery/execution .....	10
2.7 Reporting .....	10
<b>3 Exclusion and selection criteria .....</b>	<b>12</b>
3.1 Exclusion criteria .....	12
3.2 Selection criteria .....	13
<b>4 Award of the contract .....</b>	<b>15</b>
4.1 Technical evaluation .....	15
4.2 Technical proposal .....	15
4.3 Technical quality threshold .....	16
4.4 Financial evaluation .....	16
4.5 Financial proposal .....	16
4.6 Choice of the selected tender .....	16
<b>ANNEX I – DRAFT CONTRACT .....</b>	<b>17</b>
<b>ANNEX II - MODEL FINANCIAL OFFER 14.CAT.OP.050 .....</b>	<b>18</b>
<b>ANNEX III - CURRICULUM VITAE .....</b>	<b>19</b>
<b>ANNEX IV - DECLARATION ON EXCLUSION CRITERIA .....</b>	<b>20</b>
<b>ANNEX V - LEGAL ENTITY FORM .....</b>	<b>21</b>
<b>ANNEX VI - FINANCIAL IDENTIFICATION FORM .....</b>	<b>22</b>
<b>ANNEX VII - TENDER SUBMISSION FORM .....</b>	<b>23</b>
<b>ANNEX VIII - FINANCIAL INFORMATION FORM .....</b>	<b>26</b>

## **Introduction to EDA**

Pursuant to Council Decision 2011/411/CFSP of 12 July 2011 defining the statute, seat and operational rules of the European Defence Agency and repealing Joint Action 2004/551/CFSP, the mission of the European Defence Agency (hereinafter “EDA” or “the Agency”) is "to support the Council and the Member States in their effort to improve the EU's defence capabilities in the field of crisis management and to sustain the CSDP as it stands now and develops in the future."

### Functions and tasks

The European Defence Agency, within the overall mission set out in the Agency's constituent act, is ascribed four functions, covering:

- developing defence capabilities;
- promoting Defence Research and Technology (R&T);
- promoting armaments co-operation;
- creating a competitive European Defence Equipment Market and strengthening the European Defence, Technological and Industrial Base.

All these functions relate to improving Europe's defence performance, by promoting coherence. A more integrated approach to capability development will contribute to better-defined future requirements on which collaborations - in armaments or R&T or the operational domain - can be built. More collaboration will, in turn, provide opportunities for industrial restructuring and progress towards the continental-scale demand and market, which industry needs.

Further information can be found on the Agency's web site at <http://www.eda.europa.eu>

## 1 Overview of this tender

### 1.1 Description of the contract

The services required by EDA are described in the terms of reference in part 2 of the present tender specifications.

### 1.2 Timetable

Summary timetable	Date	Comments
Launch date	01 August 2014	
Deadline for request of clarifications from EDA	08 September 2014	
Site visit or clarification meeting (if any)	NA	[Not applicable]
Last date on which clarifications are issued by EDA	12 September 2014 – 17:00	
<b>Deadline for submission of tenders</b>	22 September 2014	Tenders delivered by hand shall be submitted not later than <b>17:00h Local Time</b>
Opening session	24 September 2014 - 10:00	
Interviews	NA	Estimate
Completion date for evaluation of tenders	October 2014	Estimate
Signature of contract(s)	October 2014	Estimate

### 1.3 Participation in the tender procedure

Tenderers must not be in any of the exclusion criteria indicated in section 3.1 of these tender specifications and must have the legal capacity to allow them to participate in this tender procedure (see section 3.2.1).

Please note that any attempt by a tenderer to obtain confidential information, enter into unlawful agreements with competitors or influence the evaluation committee or the EDA during the process of examining, clarifying, evaluating and comparing tenders will lead to the rejection of his tender and may result in administrative penalties.

### 1.4 Participation of consortia

Consortia, may submit a tender on condition that it complies with the rules of competition.

A consortium may be a permanent, legally-established grouping or a grouping which has been constituted informally for a specific tender procedure.

Such grouping (or consortia) must specify the company or person heading the project (the leader) and must also submit a copy of the document authorising this company or person to submit a tender. All members of a consortium (i.e., the leader and all other members) are jointly and severally liable to the Contracting Authority.

In addition, each member of the consortium must provide the required evidence for the exclusion and selection criteria (see **Section 3** of these tender specifications).

The participation of an ineligible person will result in the automatic exclusion of that person. In particular, if that ineligible person belongs to a consortium, the whole consortium will be excluded.

The compliance with the selection criteria (economic and financial capacity, technical and professional capacity requirements) will be verified on a consolidated level at the consortium level.

## 1.5 Sub-contracting

**The tenderer must indicate clearly, which parts of the work will be sub-contracted.**

Sub-contractors must satisfy the eligibility criteria applicable to the award of the contract. If the identity of the intended sub-contractor(s) is already known at the time of submitting the tender, all sub-contractors must provide the required evidence for the exclusion and selection criteria as detailed in **Section 3** of these tender specifications.

If the identity of the sub-contractor is not known at the time of submitting the tender, the tenderer who is awarded the contract will have to seek the EDA's prior written authorisation before entering into a sub-contract.

Where no sub-contractor is given, the work will be assumed to be carried out directly by the bidder.

## 1.6 Presentation of the tenders

The tenders must comply with the following conditions:

### 1.6.1 Tenders must be submitted in accordance with the **double envelope system**:

The **outer envelope** or parcel should be sealed with adhesive tape and signed across the seal and carry the following information:

- the reference number of the invitation to tender 14.CAT.OP.050
- the project title **R&T focus on Satcom**
- the name of the Tenderer
- the indication "***Tender - Not to be opened by the internal mail service***"
- the address for submission of tenders (*as indicated in the letter of invitation to tender*)
- the date of posting (*if applicable*) should be legible on the outer envelope.

The outer envelope must contain **three inner envelopes**, namely, **Envelope A, B and C**.

The content of each of these three envelopes must be as follows:

#### **Envelope A – Administrative documents**

One original copy signed and 3 copies of:

- the **Tender Submission Form** found in **Annex VII**
- the duly filled in, signed and dated **Exclusion Criteria Declaration(s)** as requested in section 3.1 and using the standard template in **Annex IV**
- the duly filled in, signed and dated **Legal Entity Form(s)** as requested in section 3.2 and using the standard template in **Annex V**
- the duly filled in, signed and dated **Financial Identification Form<sup>1</sup>** using the template in **Annex VI**
- The **Economic & Financial Capacity** criteria documents as requested in section 3.2
- The **Technical & Professional Capacity** criteria documents as requested in section 3.2
- **Duly authorised signature**, i.e. an official document (e.g. statutes, power of attorney, notary statement, etc.) proving that the person who signs on behalf of the tenderer is duly authorised to do so
- In case of **consortia**, the consortium agreement or a duly signed and dated consortium statement by each of the consortium members specifying the company or person heading the project and authorised to submit a tender on behalf of the consortium (*please see **Section 1.54** of the Tender Specifications*)

#### **Envelope B – Technical proposal**

One signed original and 3 (three) photocopies of the technical proposal providing all information requested in point 4.2.

#### **Envelope C – Financial proposal**

One signed original, 3 (three) photocopies of the financial proposal based on the format found in **Annex II**

- 1.6.2** The original tender must be marked “**ORIGINAL**”, and the copies signed in the same way as the original and marked “**COPY**”.
- 1.6.3** Tenders should be drafted in one of the official languages of the European Union, **preferably English**. Requested documents not available in English must be accompanied by an English courtesy translation. The contract shall be entered into in English.

It is extremely important that tenders be presented in the correct format and include all documents necessary to enable the evaluation committee to assess them. Failure to respect these requirements will constitute a formal error and may result in the rejection of the tender.

### **1.7 Period during which the tenders are binding**

Period of validity of the tenders, during which tenderers may not modify the terms of their tenders in any respect is 120 days after the deadline for the submission of tenders. In exceptional cases, before the period of validity expires, the EDA may ask tenderers to extend the period for a specific number of days, which may not exceed 40.

The selected tenderer must maintain its tender for a further 60 days from the date of notification that his tender has been recommended for the award of the contract. The further period of 60 days is added to the validity period irrespective of the date of notification.

---

<sup>1</sup> in case of consortia, only **one** Financial Identification Form for the whole consortium shall be submitted, nominating the bank account into which payments are to be made under the contract in the event that the respective tender is successful

## 1.8 Contacts between the EDA and tenderers

Contacts between the EDA and tenderers are prohibited throughout the procedure save in exceptional circumstances and under the following conditions only:

### A. Before the final date for submission of tenders:

- At the request of the tenderer, the EDA may provide additional information solely for the purpose of clarifying the nature of the contract. Any request for additional information must be made in writing by **e-mail** at [procurement@eda.europa.eu](mailto:procurement@eda.europa.eu) or at the **Fax no.:** **+32 (0)2 504 29 75** and should indicate the reference number and the title of the tender.
- Requests for additional information received after the deadline for request of clarifications from the EDA as specified in point 1.2 – *Timetable* will not be processed.
- The EDA may, on its own initiative, inform interested parties of any error, inaccuracy, omission or any other clerical error in the text of the call for tender.
- Any additional information including that referred to above will be published on the EDA's website. Please ensure that you visit regularly the site for updates.

### B. After the opening of tenders:

- If, after the tenders have been opened, some clarification is required in connection with a tender, or if obvious clerical errors in the submitted tender must be corrected, the EDA may contact the tenderer, although such contact may not lead to any alternation of the terms of the submitted tender.

## 1.9 Visits to EDA premises

No site visit/information meeting at EDA's premises is deemed necessary for this procedure.

## 1.10 Division into lots

This tender is not divided into lots. The tenderer must be in a position to be able to provide all the services requested.

## 1.11 Variants

In the absence of any such indication in the terms of reference your tender should not deviate from the supplies requested.

## 1.12 Security standards

In the general implementation of its activities and for the processing of tendering procedures in particular, the EDA observes the Council's security rules set out in Council Decision 2013/488/EU of 23 September 2013 on the security rules for protecting EU classified information.

## 1.13 Contract provisions

In drawing up your tender, you should bear in mind the provisions of the draft contract (see **Annex I** to the present tender specifications). In particular, the draft contract indicates the method and the conditions for payments to the contractor.

## 2 Terms of Reference

The European Council conclusions in December 2013 called for concrete deliverables, as well as substantive tasking and timelines, supporting the EDA framework and roadmap on Governmental Satellite Communications which has been endorsed by the Ministers of Defence in November 2013. The EDA implementation roadmap includes an update of the Strategic Research Agenda for R&T developments on Satellite communications since the last survey has been produced in 2008.

The main objective of the activity is to propose and define a Strategic Research Agenda providing R&T priorities of defence interest (excluding Milsatcom) with various maturity levels (short term with possible demonstrator in the timeframe 2018-2020, medium term with technological developments for 2025 and long term development beyond 2030).

Based on the proposed implementation roadmaps, the outcomes of this study shall allow EDA to identify and support the business case demonstrating the benefit to act in cooperation within the EDA framework (R&T Cat A/B projects), potentially also with the ESA (Artes programme) and the EC (H2020).

This shall also sustain the Governmental Satellite Communication initiative, defined as the ability to provide to various communities of users satellite communication resources characterised by a high level of assured SATCOM offering also a certain robust security level with some resilience, utilising commercially available solutions with minimal modifications.

### 2.1 Introduction: background of the invitation to tender

SATCOM is a crucial capability required for the conduct of operations. The demand for SATCOM capacity will increase over the next decades due to increased information demand and significantly improved sensor technology. The breadth of potential users, the diversity of missions as well as the current budgetary context imply the development of future SATCOM capability in a more modular and scalable manner, able to match a wide range of civil and defence applications and missions.

### 2.2 Description of the subject and scope of the contract

Three phases are foreseen:

#### - **WP1: Landscaping:**

The contractor will receive as input documents the EDA Strategic Research Agenda on Satcom elaborated in 2008 (see extract in annex) and the European Space and Technology Platform Strategic Research Agenda elaborated in 2006 (See extract in annex) . Its first task will be to analyse the relevance of the different priorities identified at that time and confirm what priorities are still valid in 2014 (excluding those related to Milsatcom). The contractor should assess the reasons why no progress has been made so far on these remaining priorities.

The contractor will also collect all available technical and policy documents and through exchange of information with relevant stakeholders<sup>2</sup> will map R&T efforts related to Satcom (not necessarily military). This will address Satcom communication technologies, materials, structure, components, payload, digital processing, architecture Payloads, platforms, management and allocation of Satcom resources and when of specific interest, ground systems.

Based on his findings, the contractor will develop the various categories of R&T priorities proposed in this call for tender. For each category, the description must be as exhaustive and comprehensive as possible. The reader even not Satcom expert shall understand the challenge of the proposed priority.

Among these priorities, a special emphasis shall be given to the following topics:

---

<sup>2</sup> EU entities, space industry, government, private companies and laboratories.



- Low-cost satellite communication terminal on the move,
- micro-, nano-, pico- satellites

- **WP2: Analysis:**

Based on the landscaping exercise realised in WP1, this phase will highlight the defence interest of the various trends in R&T developments focussing in particular those of dual use nature.

The security of supply and non-EU dependency will also be addressed at this stage.

For each trend, a technology readiness level will be assessed.

The assessment of policy references will enable to map compatible positions in the different areas, and to draw compatible sub-groups. Those divisions will be proposed in accordance with a possible cooperation considering the different projects funded either by the EC (Horizon 2020) or ESA (ARTES projects).

When possible, this analysis will link for each trend the budget available for each entities/countries, and the global financial effort to reach operational product/functionality.

For each area/domain, a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis will be presented, as a synthesis of the different elements/policy/constraints. The projects issued from Horizon 2020 and ESA/Artes with which synergies should be promoted will be clearly identified in the assessment.

The analysis will also mention explicitly the identified areas which are particular relevant for the Governmental Satellite Communication initiative.

- **WP3: Recommendation:**

The contractor will provide its recommendation concerning the R&T effort to be supported with associated budget and roadmap according to three maturity levels:

- short term with possible demonstrator in the timeframe 2018-2020,
- medium term with technological developments for 2025 in line with the development of the next generation of Governmental satellite communication.
- long term development beyond 2030

A fiche will summarize each priority and a Media & Communication kit should be provided to explain what the challenges are. The possible EDA R&T CAT B projects shall be clearly identified from these fiches (contend, partners, budget, gap to be filled). The maturity of these R&T workstrands shall also be clearly mentioned. A specific highlight shall be given to the activities which could be mature enough (high TRL<sup>3</sup> level) to justify the development of a demonstrator in the time frame 2018-2020, in particular in relation with the CSDP preparatory action envisaged also for this period.

The main output is to clearly identify what are the R&T main axes to be funded and how we can do it in cooperation within the EDA framework, potentially also with the ESA and the EC. The deliverables of this WP should enable to convince participating Member States (pMS) Point of Contact (PoC) of their interest to do so through a leverage effect to be determined. Specific highlights should be given to R&T activities particular relevant for the Governmental Satellite Communication initiative as well as those which could be eligible to the CSDP preparatory action.

### 2.3 Characteristics of the required deliverables

Nomenclature and format proposed for the deliverables:

**D0.x: Management of the project:** Project Roadmap, Risk management, WBS, Meeting agenda, presentations & reports

---

<sup>3</sup> TRL : Technology Readiness Level

A draft management plan is to be elaborated already at the tendering stage, building upon the information provided in these tender specifications.

The management plan shall:

- Provide evidence that the contractor endorses responsibility for the general objectives of the project and that he will produce the required results;
- Propose any potential relevant modification in the logic of the project to improve its results;
- Include a Statement of Work (including an analytical outline on how the key aspects of the study will be approached);
- Explain the organisation, methodology and means intended to be used in the project;
- Explain the monitoring structure proposed to ensure appropriate decisions in due time, including interaction with EDA and its representatives for project orientation matters.

This management plan considered as a living document will be updated during the duration of the contract and will be part of the deliverables.

- **Validation criteria for this Work Package:** Living document (updates); time to deliver before and after meeting; fidelity of the reports; ....

**D1.x: Landscaping:** The structure of the document(s) should enable to read it/them as such, but also enable a further digital exploitation (hyperlink, matrix,...). Every data, figures shall be clearly referenced to ensure reliability of the argumentation. The skeleton of the document is part of the selection criteria to be provided during the call for tenders.

- **Validation criteria for this Work Package:** Exhaustiveness and comprehensiveness level per country or entity, process, architecture, component and technology; Structure of the document; reliability of the sources used; ...

**D2.x: Analysis:** The structure of the document(s) should enable to read it/them as such, but also enable a further digital exploitation (hyperlink, matrix,...). The document shall clearly address the different requirements listed in the description of the WP2.

- **Validation criteria for this Work Package:** Depth of analysis, Ability of post processing the final document; choice of the "stovepipes"; realism and pertinence of the fields of view....

**D3.x: Recommendation:** A global roadmap must be established, and for each area, following a template to be proposed in the tender, fiches will describe each topic. The proposed content of the media kit should be also proposed in the tender

- **Validation criteria for this Work Package:** realism and pertinence of the roadmap and the fiches, potential impact of the media kit on different targets, comprehensiveness of fiches,

## 2.4 Volume of the contract

The estimated budget for this procedure is between 80 000 and 175 000 Euros, all taxes included. Any tender exceeding 175 000 Euros will be excluded. Please note that the minimum is only indicative.

## 2.5 Duration of the contract

Maximum 10 months

## 2.6 Place of delivery/execution

The documents and meetings will be delivered/executed normally at the EDA premises. Exception can be accepted during the contract for specific and agreed reasons.

## 2.7 Reporting

All documents mentioned in the contract are to be submitted to the Project Manager identified in the contract who is responsible for their approval.

- Agenda, presentations and documents to be discussed during a meeting must be sent by e-mail minimum 5 days before the meeting.
- Reports of the meeting must be sent maximum 4 days after the end of the meeting to the project. Project manager will comment or approve them in less than 2 weeks.

The contractor shall organize intermediate meetings, every 2 months (Add-on meetings can be held in virtual rooms (VTC, phone conference or Lync) if necessary).

The kick-off meeting will take place at EDA premises after the signature of the contract.

Kick-off, progress and final meetings will be organised to the maximum extent possible during meetings of the EDA Project Team Satellite Communication. In case it is not possible, meetings will be organised between EDA and the contractor.

Details concerning meetings will be discussed and agreed in the kick-off meeting.

The contractor shall write and propose to EDA approval all minutes of the meetings held for this contract.

The final version of the deliverables (see 2.3) shall be submitted in electronic form followed by a paper version form once approved by EDA. It has to be noted that up to 30 additional copies could be requested by the pMS and other organisation bodies (paper and/or electronic format).

To is the date of entry into force in accordance with the provisions of the contract.

<b>Nr</b>	<b>Title</b>	<b>Description</b>	<b>Timelines</b>	<b>Format deliverable</b>
1	<b>Kick-off presentation</b>	Presentation of the study including a draft management plan	Before To+1 month	electronic copy (MS Office/pdf)
2	<b>Intermediate report</b>	Intermediate status report.	To+5 months	5 hard-paper copies and electronic copies (MS Office/pdf)
3	<b>Final presentation and final report</b>	Presentation of the reports.	To+10 Months	5-30 hard-paper copies of final electronic copies (MS Office/pdf)

Interim and final payments specified in the contract are realised upon completion of items 2 and 3 respectively in the above Table.

### 3 Exclusion and selection criteria

#### 3.1 Exclusion criteria

Participation to this tender is only open to tenderers who are not in one of the situations listed below:

- a) bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) have been convicted of an offence concerning their professional conduct by a judgement which has the force of *res judicata*;
- c) have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;
- d) have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed;
- e) have been the subject of a judgement which has the force of *res judicata* for fraud, corruption, involvement in a criminal organization or any other illegal activity detrimental to the Communities' financial interests;
- f) following another procurement procedure or grant award procedure financed by the Community budget, they have been declared to be in a serious breach of contract for failure to comply with their contractual obligations.

In addition to the above, contracts may not be awarded to tenderers who, during the procurement procedure:

- are subject to a conflict of interest;
- are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information.

#### **Means of proof required**

Tenderers, **including all consortium members and all sub-contractors where applicable**, shall provide a declaration on their honour (see model in **Annex IV**), duly signed and dated, stating that they are not in one of the situations referred to above.

#### ***Nota bene:***

The tenderer to whom the contract is to be awarded shall provide, within 15 days following notification of award and preceding the signature of the contract, the following documentary proofs to confirm the declaration referred to above:

- For points a), b) and e) a recent extract from the judicial record or, failing that, an equivalent document recently issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied.
- For point d) a recent certificate issued by the competent authority of the State concerned.

Where the document or certificate referred to 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.

## 3.2 Selection criteria

The tenderers must submit evidence of their legal, economic, financial, technical and professional capacity to perform the contract.

### 3.2.1 Legal capacity

#### Requirement

The tenderers, **including all consortium members and all sub-contractors where applicable**, are asked to prove that they are authorised to perform the contract under their national law as evidenced by 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.

#### Evidence required

Each tenderer, **including every consortium member and every sub-contractor where applicable**, shall provide a duly filled in and signed **Legal Entity Form** (see **Annex V**) accompanied by the documents requested therein.

### 3.2.2 Economic & Financial capacity

#### Requirement

The tenderer must have the following economic and financial capacity to perform the contract:

- The tenderer must be in a stable financial position.
- The tenderer must have generated an annual turnover in the last closed financial year of at least 500.000 €.

Evidence on compliance with the economic and financial capacity requirement must be provided by the following document:

#### Evidence required

- The tenderer which according to the law of the country in which it is established is required to publish the balance sheet shall complete and include in the offer a financial statement form as in Annex VIII to these tender specifications. Please observe the following aspects in completing this financial statement:
  - a) It should be certified by means of a signature of the chief accounting officer of tendering organisation
  - b) EDA has the right during the tendering process and before awarding the contract to request further evidence on the tenderer's compliance with the economic & financial capacity requirement, in which case balance sheets and profit & loss accounts for the past financial years may be requested.
  - c) In the case of a consortium submitting an offer, or in case of subcontracting, the financial statement as is Annex VIII should be included in the offer for all consortium partners and subcontractors.
  - d) In the case of a physical person the financial statement as in Annex VIII should be included in the offer for where only the lines 16 and 17 need to be filled in and the financial statement can be signed by the physical person only.
- The tenderer, which according to the law of the country in which it is established is not required to publish the balance sheet, shall provide the extract from its budget (2011, 2012 and 2013) and evidence on generating

an annual turnover of at least € 500,000 each in the last 3 closed financial years

### **3.2.3 Technical and professional capacity**

#### **Requirement(s)**

The tenderer must have the following technical capacity to perform the contract:

- Extensive and proven experience of more than 5 years in SATCOM area, and/or satellite's R&T and the provision of services described in the technical specifications (ToR);
- Ability to provide a team of experts compliant with the profile requirements detailed in the technical specifications (ToR);
- Access to documentation/policy of EU main stakeholders in Satcom area.

#### **Evidence required**

Evidence on compliance with the technical capacity requirement must be provided by:

- A list of major relevant projects and publications related to the subject of this assignment carried out in the course of the past 5 years by the legal entity or entities submitting the offer;
- Detailed curriculum vitae of all team members proposed for the assignment, taking account of the profile requirements in the technical specifications (ToR) ; EDA strongly recommends submitting the CVs in the EU CV format which can be accessed here.
- Information on which parts or tasks of the assignment will be assumed by a consortium partner or a subcontractor. The respective subcontractor or consortium partner should be specified for each part or task.
- All additional documentation deemed necessary from the tenderer's perspective to demonstrate the ability to meet the prescribed technical requirements.
- Template and examples to demonstrate that the study logic is well understood.

**The technical and professional capacity will be assessed in relation to the combined capacities of all the Consortium members [leader and member(s)] and the subcontractor(s), if any, as a whole.**

## 4 Award of the contract

Only the tenders meeting the requirements of the exclusion and selection criteria will be evaluated in terms of quality and price (Best value for money).

### 4.1 Technical evaluation

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

The technical proposal shall include **a summary giving for each award criteria the relevant elements with a reference to the relevant sections of the proposal.**

Only bids that have reached a total score defined in section 4.3 will be taken into consideration for the award of the contract.

<b>TECHNICAL AWARD CRITERIA</b>	Maximum score
<b>1. Understanding of the objectives of the contract and the assignments to be carried out</b> <i>This is to assess if the tenderer has understood the purpose of the contract taking into account all the aspects of the technical specifications.</i>	15
<b>2. Methodology proposed for implementation</b> <i>This is to assess the degree to which the methodology proposed shows the capacity to resolve the questions underlying the tender in a realistic and well-structured way as well as to whether the methods proposed are in conformity with the need of EDA and technical specifications.</i>	30
<b>3. Quality and relevance of the statement of work to fulfil the activities set in section 2 (Terms of reference)</b>	40
<b>4. Project management</b> <i>This is to assess to which extent the team is suitable for the implementation of the assignment. Attention will be drawn to project management aspects (Organization, worksharing, risk management, quality aspects, ...)</i>	15

### Interviews

The Evaluation Committee does not expect to conduct any interviews.

### 4.2 Technical proposal

The assessment of the technical quality will be based on the ability of the tenderer to meet the purpose of the contract as described in the terms of reference. To this end, technical proposal shall contain the following information to allow evaluation of their tender according to the technical criteria mentioned above:

- WP0: Description of the organisational structure to be put in place for the proper performance of the contract, in particular WBS and its milestones, Risk assessment, and the staff designated to perform each task;
- WP1: Description of the process used for assuring an optimal landscaping, covering all aspects of the problematic. What will be covered and how?
- WP2: Description of the methodology and structure used for the analysis; in particular a preliminary classification of the R&T priorities to be justified (in the form

of a skeleton of the outcome of WP1) demonstrating the ability of the tenderer to realise the landscaping exercise will be provided.

- WP3: Examples of contents for the roadmap, template for fiches, content of media kit(s) and their justification;
- Other information in order to assess the criteria established in section 4.1.

In addition to the above the tenderer must provide the information concerning sub-contracting as requested in **point 1.5**.

#### **4.3 Technical quality threshold**

Only tenders scoring 75 points or more (of a maximum of 100) points against the technical award criteria will have their financial proposal evaluated.

#### **4.4 Financial evaluation**

The evaluation will be made on the basis of the price offered. Where a maximum budget is mentioned in these tender specifications, any tenderer submitting a financial proposal exceeding this budget will be rejected.

#### **4.5 Financial proposal**

- The financial proposal should be presented in the format found in **Annex II**.
- Prices must be quoted in **EURO** and include all expenses necessary to perform the contract.
- The price quoted is fixed and is subject to **NO revision**.
- the Contract, prices may be subject to revision. The revision shall be done as stipulated in the annexed draft contract.
- Prices must be quoted free of all duties, taxes and other charges (including VAT) as the EDA is exempt from such charges under Article 3 of the Protocol on the Privileges and Immunities of the European Union.
- Costs incurred in preparing and submitting tenders are borne by the tenderer and shall not be reimbursed.

#### **4.6 Choice of the selected tender**

The most economically advantageous tender is established by dividing the technical quality score against then price.



**ANNEX I – DRAFT CONTRACT**

**ANNEX II - MODEL FINANCIAL OFFER 14.CAT.OP.050**

Prices should be all-inclusive; the Agency will not pay expenses for any additional costs incurred from the execution of the contract.

**Financial proposals exceeding the amount indicated in Section 2.4 shall be excluded outright.**

<b>Name of Tenderer:</b>	
--------------------------	--

<b>TOTAL COST OF ASSIGNMENT, INCLUDING ALL ASSOCIATED EXPENSES AND EXCLUDING VAT :</b>	€
--	---

<b>Name:</b> (of the Tenderer or authorised representative)	<b>Signature:</b>	<b>Date:</b>
--	-------------------	--------------

### **ANNEX III - CURRICULUM VITAE**

To be downloaded from the following URL address:

<http://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>

## ANNEX IV - DECLARATION ON EXCLUSION CRITERIA

***(To be completed and signed by each Consortium member and by each Sub-contractor, where applicable)***

The undersigned:

Name of the individual/company/organisation:

Legal address:

Registration number/ID Card No.:

VAT number:

Declares on oath that the individual/company/organisation mentioned above is not in any of the situations mentioned below:

- a) they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) they have been convicted of an offence concerning their professional conduct by a judgement which has the force of *res judicata*;
- c) they have been guilty of grave professional misconduct proven by any means which the EDA can justify;
- d) they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed;
- e) they 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 Communities' financial interests;
- f) following another procurement procedure or grant award procedure financed by the European Union or the Agency's general budget, they have been declared to be in serious breach of contract for failure to comply with their contractual obligations.
- g) they are subject to a conflict of interest;
- h) they are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information

Full name:

Date & Signature:

## **ANNEX V - LEGAL ENTITY FORM**

To be downloaded from the following URL address:  
[http://ec.europa.eu/budget/info\\_contract/legal\\_entities\\_en.htm](http://ec.europa.eu/budget/info_contract/legal_entities_en.htm)

**ANNEX VI - FINANCIAL IDENTIFICATION FORM**

**FINANCIAL IDENTIFICATION**

<u><b>ACCOUNT HOLDER</b></u>	
NAME	<input type="text"/>
ADDRESS	<input type="text"/>
TOWN/CITY	<input type="text"/> POSTCODE <input type="text"/>
CONTACT PERSON	<input type="text"/>
TELEPHONE	<input type="text"/> FAX <input type="text"/>
E - MAIL	<input type="text"/>
PERSONAL NUMBER	<input type="text"/>
INSTITUTION	<input type="text"/>

<u><b>BANK</b></u>	
BANK NAME	<input type="text"/>
ADDRESS	<input type="text"/>
TOWN/CITY	<input type="text"/> POSTCODE <input type="text"/>
ACCOUNT NUMBER	<input type="text"/> - <input type="text"/> - <input type="text"/>
IBAN	<input type="text"/>
SWIFT	<input type="text"/>

REMARKS :

<p><b><u>BANK STAMP + SIGNATURE BANK REPRESENTATIVE</u></b> (Both Obligatory)</p>
---

<p><b><u>DATE + SIGNATURE ACCOUNT HOLDER :</u></b> (Obligatory)</p>
---

ANNEX VII - TENDER SUBMISSION FORM

---

R&T FOCUS ON SATCOM

14.CAT.OT.050

---

**One signed original** of this tender submission form must be supplied, together with **three copies**.

---

**1. SUBMITTED by (i.e. the identity of the Tenderer)**

	Name(s) of legal entity or entities submitting this tender	Nationality <sup>4</sup>
<b>Leader</b>		
<b>Member 2</b>		
<b>Etc ... <sup>5</sup></b>		

**2. SUBCONTRACTORS (if applicable)**

	Name(s) of the legal entity or entities identified as sub-contractor(s)	Nationality
<b>Sub-contractor 1</b>		
<b>Etc ... <sup>6</sup></b>		

---

<sup>4</sup> Country in which the legal entity is registered

<sup>5</sup> If this tender is being submitted by an individual legal entity, the name of the legal entity should be entered as "Leader" (and all other lines should be deleted)

<sup>6</sup> Add / delete additional lines for sub-contractors as appropriate

**3. CONTACT PERSON for this tender (to act as focal point for all communication which may take place between the EDA and the Tenderer)**

<b>Name and position</b>	
<b>Organisation</b>	
<b>Address</b>	
<b>Telephone</b>	
<b>Fax</b>	
<b>e-mail</b>	

**4. STATEMENT**

I, the undersigned, being the authorised signatory of the above Tenderer (including all consortium members, in the case of a consortium), hereby declare that we have examined and accept without reserve or restriction the entire contents of the tender specifications for the tender procedure referred to above.

We are fully aware that, in the case of a consortium, the composition of the consortium cannot be modified in the course of the tender procedure except with the prior written authorisation of the EDA. We are also aware that the consortium members would have joint and several liability towards the EDA concerning participation in both the above procedure and any contract awarded to us as a result of it.

Our tender is subject to acceptance within the validity period stipulated in point 1.7 of the Tender Specifications and is made up of the following documents:



<b>ENVELOPE A - ADMINISTRATIVE DATA: (One signed original and 3 copies)</b>	
▪ This <b>Tender Submission Form</b>	<input type="checkbox"/>
▪ The duly filled in, signed and dated <b>Exclusion Criteria Declaration(s)</b> by every legal entity identified under point 1 and point 2 of this Tender Submission Form	<input type="checkbox"/>
▪ The duly filled in, signed and dated <b>Legal Entity Form</b> ( <i>using the standard template referred to in Annex V to the Tender Specifications</i> ) and the supporting documents requested therein, by every legal entity identified under point 1 and point 2 of this tender submission form	<input type="checkbox"/>
▪ The duly filled in, signed and dated <b>Financial Identification Form</b> ( <i>using the standard template in Annex VI to the Tender Specifications</i> ) to nominate the bank account into which payments would be made in the event that our tender is successful	<input type="checkbox"/>
▪ <b>Documents proving the economic and financial status</b> (as requested in point 3.2.2 of the Tender Specifications) of every legal entity identified under point 1 and point 2 of this tender submission form	<input type="checkbox"/>
▪ <b>Documents proving our technical and professional capacity</b> (as requested in point 3.2.3 of the Tender Specifications)	<input type="checkbox"/>
▪ <b>Duly authorised signature</b> , i.e. an official document ( <i>statutes, power of attorney, notary statement, etc.</i> ) proving that the person who signs on behalf of the Tenderer is duly authorised to do so	<input type="checkbox"/>
▪ Our <b>consortium agreement/</b> duly signed and dated <b>consortium statement</b> by each of the consortium members specifying the company or person heading the project and authorised to submit a tender on behalf of the, as requested in point 1.4 of the tender specifications	<input type="checkbox"/>
<b>ENVELOPE B - TECHNICAL PROPOSAL</b> (one signed original and three photocopies and providing all information requested in point 4.2 of these specifications).	<input type="checkbox"/>
<b>ENVELOPE C - FINANCIAL PROPOSAL</b> (one signed original, three photocopies using the template in Annex II), <b>which is submitted in a separate, sealed envelope.</b>	<input type="checkbox"/>

Signed on behalf of the Tenderer

<b>Name</b>	
<b>Signature</b>	
<b>Date</b>	

**ANNEX VIII - FINANCIAL INFORMATION FORM**

Please refer to Excel document in attachment