

## Call for tenders' details

Title: 15.ESI.OP.162 Overarching strategic research agenda and CapTech SRAs harmonisation (OSRA).

Start date: 21/10/2015

Time limit for receipt of tenders: 11/12/2015

Contracting authority: European Defence Agency (EDA)

Status: Closed

## Call for tenders question list

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#	Submission date	Publication date	Question subject	Question	Answer
1	10/11/2015 09:01	16/11/2015 16:06	Language skills beyond English	The call requires that the Contractor be able to include pMS acquisition and R&T planning documents in its analysis (in particular Task 1.2). Can EDA say something on the volume of documents in different national languages that the Contractor is expected to digest? Or will it be possible to rely on translations or summaries in English? Or oral summaries by, e.g., national representatives in the CapTech system?	<p><b>16/11/2015</b> The Contractor will only be requested to work with documents in English.</p> <p>As described in the Task 1.2, the tasks will consist in the gathering of English versions of the R&amp;T planning documents and/or SRAs as already published by and/or available in the pMS Ministries of Defence.</p> <p>The expected volume corresponds to the gathering of English language documents from 10 to 15 pMS.</p> <p>The Contractor will not be expected to produce translations from documents not available in English.</p> <p>Oral summaries are not recommended, as the analysis will have to be back-traceable. Summaries could be acceptable when no other translation is available.</p>

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2	25/11/2015 10:43	27/11/2015 14:24	Questions and remarks on Call for Tenders 15.ESI.OP.162 (cf. p. 29 of Specifications): Q1	<p>Q1. Could EDA please explicate the following statement in p. 7: “In the short term, perspective a detailed research plan including an investment plan and a roadmap for Defence R&amp;T investment, taking into account different funding schemes available, should be provided.”</p> <p>The idea of providing a “detailed research plan” – at least as we interpret the term – does not resonate well with what comes through elsewhere in the Specifications. For example the “OSRA, to be developed [...] will provide an informed, well documented, non-binding informative resource” (p. 6) and “[t]he identification of R&amp;T technologies, building blocks and priorities will guide future EU defence R&amp;T activities, by identifying the best ways to incentivize cooperation in the different technology area[s]” (p. 7). Further, “[t]he contractor will produced a harmonized view of relevant European defence research priorities, in the context of CSDP and additional pMS priorities, and the possible paths to achieve them, taking into account different funding mechanisms available” (p. 13). In particular given the sovereignty of pMS we find the latter quotes very</p>	<p><b>27/11/2015</b></p> <p>In order to mitigate the risk mentioned in the question, the alignment with pMS interest, while taking into account sovereignty issues, the research plan has to be a non-bidding informative document, as stated in page 6. On the other hand, sovereignty issues should not be tackled, as mentioned in page 7, the final objective of any EDA SRA or OSRA is to identify the most interesting technologies for cooperation at EU level (then excluding the technologies of national interest). The identification of technologies for cooperation, and the need to avoid duplication, will have to rely on public and the best available information.</p> <p>The different funding mechanism available refers to EDA mechanisms, and also other EU mechanisms such as ESIF, PP, PADR, etc.</p> <p>The identification of EU research priorities need to be defined taking into account the EU context (CSDP), and pMS priorities, in order to avoid duplication with national research programmes (not to include the national priorities under the EU priorities).</p> <p>Marketing the research plan is not foreseen. As stated in the question, to develop the process and the research</p>

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				<p>pMS we find the latter quotes very insightful with regard to how the project can deliver value (also cf. Q2 on the role of “building blocks”). While it should be possible within the contract to provide the knowledge base necessary for subsequently reaching pMS ownership, supporting the process whereby such ownership is achieved is not included in the Specifications. While a tentative detailed research plan could be developed within the contract as a proof of concept, marketing such plan as a main result of the study in our judgment risks alienating pMS.</p>	<p>develop the process and the research plan itself is the objective of the project.</p>

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3	25/11/2015 10:46	27/11/2015 14:34	Questions and remarks on Call for Tenders 15.ESI.OP.162. (cf. p. 29 in Specifications): Q2	<p>Q2. Related to the perspective we developed under Q1 we would also like EDA to elaborate on the concept “(technological) building block” (p. 7-9). Are we right in assuming that a “building block” is something like a self-contained (subject to acceptable dependences on non-European suppliers; cf. Q4) and synergistic set of innovative solutions based on extant European (European and pMS level) R&amp;T knowledge bases and with the potential to contribute towards prioritised capability needs of several pMS? Such building blocks, we assume, could be of varying character as for technology content (without prejudice to study results production of GaN circuits, stealth design tools, data fusion and signal processing, etc., etc.). Further, by providing some relevant opening in terms of R&amp;T as well as capability for all pMS (at least the 10-15 with articulated needs) the building blocks thus understood in our judgment would be uniquely well positioned to incentivise cooperation (cf. Q1).</p>	<p><b>27/11/2015</b>            Definition of a technological building block: There is no formal definition of building block, or technological building block. Therefore, it has to be defined in the context of the architectural framework NAF v3. In an architectural framework a building block is consider to be a package of functionality defined to meet specific needs, including interfaces, links, dependencies with other building blocks. It is a simplified view of the technology, its components, applications and connections with other technologies, at least. Please note that building blocks should be seen in the light of this exercise and aligned appropriately to fit the purpose.</p>

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4	25/11/2015 10:46	27/11/2015 14:43	Questions and remarks on Call for Tenders 15.ESI.OP.162. (cf. p. 29 in Specifications): Q3	<p>Q3. Scenarios and missions as used in p. 7-9 is yet an area in need of explication:</p> <p>a) In our view (mission) scenarios is the standard way in military planning activities of representing missions. But in the Specifications it seems that the two concepts are conceived as distinct (#1 vs. #3 in p. 7, "scenarios and missions" in p. 8). How should this be understood?</p> <p>b) In p. 9, #3 there is talk of "validated scenarios". We assume that the two CDP related types of scenario mentioned in p. 8 should be seen as "validated". What other scenarios can be seen as having this quality and how can we access them?</p> <p>c) At ibid is stated that if not using validated scenarios, "consistency analysis should be performed." What is meant by consistency analysis here? An in-official scenario validation performed by the contractor or what?</p>	<p><b>27/11/2015</b></p> <p>Scenarios and missions: Scenario is the context of a mission. The mission is the group of tasks to be performed, within a specific context/scenario. The same mission (maritime surveillance to prevent piracy), can take place in different scenarios (Somalia sea in summer 2010 with political stability, or Mediterranean in winter 2015 with a migratory crisis – same mission, different scenario).</p> <p>CDP team has developed a set of future scenarios to be used by the contractor, and the missions are defined by CSDP. The scenarios will be made available to the contractor in a need to know basis. If not using these scenarios, the proposed ones has to be proven to be solid and consistent (consistency analysis required).</p>
5	25/11/2015 10:46	27/11/2015 14:44	Questions and remarks on Call for Tenders 15.ESI.OP.162. (cf. p. 29 in Specifications): Q4	Q4. In p. 9, #5 we understand the dependencies to be reduced as such pertaining to providers in non-European countries. Correct?	<p><b>27/11/2015</b></p> <p>Yes, but also taking into account and depending on the level of risk.</p>

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6	25/11/2015 10:48	27/11/2015 14:49	Questions and remarks on Call for Tenders 15.ESI.OP.162. (cf. p. 29 in Specifications): Q5	Q5. In relation to the architecture to be provided (p. 9, #6) we understand that the word "full" in the heading should be understood subject to the subsequent qualification that "[o]nly those views that are useful to develop the technology building blocks should be provided". Correct?	<p><b>27/11/2015</b></p> <p>Yes, this is correct. A full global technology architecture should be provided, meaning that all the elements needed to develop a technology strategy or agenda have to be defined and developed (but no need to develop all the elements of a complete enterprise architecture). Therefore, the potential contractor will have to provide an assessment of the relevant views and architecture elements needed for the development of OSRA and SRAs. In other words, a general picture of a full architecture has to be provided, while providing only the specific details for the OSRA/SRAs when needed.</p>

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7	25/11/2015 10:48	27/11/2015 14:50	Questions and remarks on Call for Tenders 15.ESI.OP.162. (cf. p. 29 in Specifications): Q6	Q6. Item e in p. 12 pertaining to Task 2.2 is not linked in the Specifications to thematically related activities in Tasks 1.4, 3.1 (taxonomy) and 3.3 (selection/prioritisation criteria). We do not understand the usefulness of Task 2.2 developing its independent proposal in these regards (which item e seems to require) while the experience of doing WP2 as well as the resulting architecture should be seen as key input to WP3. Does EDA agree?	<p><b>27/11/2015</b></p> <p>The idea is to identify the areas not covered by the EDA Technology Taxonomy in task 1.4. The inputs of task 1.4. will have to be considered in task 3.1., when upgrading the taxonomy. Tasks 1.4 and 3.1/3.3 are about the content of the taxonomy and the content of the OSRA based on the prioritization done. In order to perform a prioritization, a selection/prioritization criteria will be needed. This will have to be defined in Task 2.2. Therefore, Task 2.2.e is about the How, how to upgrade the taxonomy and a proposal on how to define the technologies selection criteria. The objective of task 2.2. is to explain how the contractor will do the work, how the content will be elaborated (not about developing the content of the new taxonomy or the selection criteria), and align with this, is the full objective of WP2. Full WP is about defining how to do the work, taking into account the existing tools, methodologies, and architectures, in order to not duplicate existing work. Therefore, yes, WP2 is THE KEY input for WP3 work.</p>



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8	25/11/2015 10:48	27/11/2015 14:51	Questions and remarks on Call for Tenders 15.ESI.OP.162. (cf. p. 29 in Specifications): Q7	Q7. In relation to the portal, how if at all does EDA foresee that it will “ensure the consistency and harmonization among the updated agendas” beyond the content developed in previous parts of the contract (p. 15)?	<p><b>27/11/2015</b></p> <p>As explained in previous question, the portal (ECP workspaces) will allow “to digitise” the SRA’s and enable the authorised participants to contribute in update exercises. Moreover through the SharePoint solution to be used for the SRA’s an overarching solution will be examined in order to collect appropriate and flagged feeds from appropriate fields in the SRA’s in order to enable a semi-automated process of constructing the OSRA. Hence a modular digital construction of the SRA linked (feeding) to the OSRA is to be envisaged”.</p> <p>On the other hand, the harmonization of future SRAs will be achieved by following the same process in all the CapTechs during the future updates. By using a common architecture (processes, templates, taxonomies, etc.), to be developed within this contract, a consistent approach and outcomes is envisaged to be achieved. Therefore harmonisation should be mainly be seen in the context of the format, structure and methodology rather than the content which may differ. The global view of NAF will also provide the consistency.</p>

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9	25/11/2015 10:48	27/11/2015 14:52	Questions and remarks on Call for Tenders 15.ESI.OP.162. (cf. p. 29 in Specifications): Q8	Q8. Items c-f in p. 18 seem to indicate that each CapTech has its separate ECP portal and that an additional separate portal is to be built for OSRA. Elsewhere ECP is presented as a single portal, however with different workspaces. Are we right in assuming that the "different ECP's" in p. 18 are what is elsewhere referred to as different ECP workspaces?	<p><b>27/11/2015</b></p> <p>The right terminology to be used is: ECP means EDA Collaborative Platform. ECP is the single IT platform, based on SharePoint 2013. This platform allows the creation of Workspaces. The Workspaces are a space/forum/portal to allow collaboration, within ECP. The main features of these workspaces have been explained in previous answers. Also, as mentioned in previous answers, each CapTech has a workspace in the ECP, allowing collaboration and work among CapTech members. All the CapTechs workspaces are built in a common way, including standard features, such as a library, lists, discussion boards, calendar or wiki. Furthermore, a workspace for the OSRA can be easily created, if needed.</p> <p>The reference to "different ECP's" refers to the different Workspaces in ECP.</p>

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10	25/11/2015 10:48	27/11/2015 14:54	Questions and remarks on Call for Tenders 15.ESI.OP.162. (cf. p. 29 in Specifications): Q9	Q9. According to #3, p. 16 at least two meetings should be held with each CapTech moderator. Tentatively we foresee more than two meetings with each moderator, but with some simultaneously involving a group of moderators for better quality of process (e.g. when addressing issues of cross-fertilisation). Can such amendments be acceptable to EDA?	<b>27/11/2015</b> Of course, this kind of meeting will be welcomed. The tender specifications request for the minimum number of meetings, it is up to the contractor to propose further meetings. However, a justification and objective of the meetings will have to be included. The meetings will have to be planned well in advance and within the scope of the contract.
11	25/11/2015 10:48	27/11/2015 14:55	Questions and remarks on Call for Tenders 15.ESI.OP.162. (cf. p. 29 in Specifications): Q10	Q10. Could EDA exemplify in the context of the eighth bullet, p. 22 what might constitute useful tools “for the reports and intermediate periods between the reports”?	<b>27/11/2015</b> The management of the project, being a rather big and strategic study, is considered crucial for its successes. Furthermore, due to the complexity of the work proposed, there will be a need to have a close reporting scheme, supported by different tools. Also a close control of documents (versions), time, and risks is expected to be handled by the contractor. As for tools, for example: MS Project, Tasks lists, EDA Workspaces, etc. It is up to the contractor to propose any other management tool.

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12	25/11/2015 10:49	27/11/2015 14:58	Questions and remarks on Call for Tenders 15.ESI.OP.162. (cf. p. 29 in Specifications): Q11	Q11. There seems to be cut-and-paste errors in the Selection Criteria (p. 43) such that the text for “Expert in defence capability development” has been incorrectly repeated also for “Expert in Systems Engineering and architectures” and “Expert in technological and technical areas covered by the CapTechs”. We are interested in learning the intended contents of these criteria.	<p><b>27/11/2015</b> Please read in Page 43 (minimum profiles included in the team):</p> <ul style="list-style-type: none"> <li>•Expert in defence capability development: 5 years' professional experience in the field of capability development.</li> <li>•Expert in Systems Engineering and architectures: 5 years' professional experience in the field of system engineering and architectures.</li> <li>•Expert in technological and technical areas covered by the CapTechs: 5 years' professional experience in the field of the research and technology domains covered by the CapTechs (At least one expert per area).</li> <li>•Expert in IT Tools development: relevant higher education degree and 5 years' professional experience in the field of IT tools development including indicatively SharePoint.</li> <li>•Expert in data collection: proven experience of 5 years in data collection techniques.</li> </ul>

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13	25/11/2015 10:49	27/11/2015 14:59	Questions and remarks on Call for Tenders 15.ESI.OP.162. (cf. p. 29 in Specifications): Q12	Q12. Could EDA indicate how in the Technical Proposal (p. 48) to distinguish between items d (“[a] thorough description of the approach to the contract deliverables including description of the methodology for how they will be achieved”) and h (“[a] description of the reference methodologies and approaches proposed to be applied for the conduct of the study”).	<b>27/11/2015</b> The objective of point d) is to have the description of the global methodology of the project, and how the deliverables requested will be successfully produced. This is meant to be the overarching philosophy, approach and methodology of the full project. Whereas in point h), the objective is to describe what are the reference methodologies (i.e. Naf v3, etc.) to be used in order to compile the global methodology for the present project.

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#	Submission date	Publication date	Question subject	Question	Answer
14	24/11/2015 09:26	27/11/2015 16:07	Technical solutions for portal	Could EDA elaborate on the technical solution foreseen for the “developed ECP portal” (p. 15), not least in view of the “indicative” inclusion of SharePoint experience in the Selection Criteria (p. 43)?	<p><b>27/11/2015</b>            EDA has established a new collaboration platform (ECP, EDA Collaboration Platform), that replaces the EDA Extranet Forums. The ECP is SharePoint based. Therefore, every CapTech have a workspace in the ECP, allowing collaboration and work among CapTech members (EDA Staff and non EDA staff).            All the CapTechs workspaces are built in a similar way, including standard features, such as a library, lists, discussion boards, calendar or wiki. The idea is not to develop another tool, but to take the benefit of these existing workspaces to gather the information of each CapTech SRA, allowing also future updates. Indicatively, creating, pages, lists and workflows to digitise the SRA’s and enable the authorised participants to contribute in update exercises is to be considered. Moreover through the SharePoint solution to be used for the SRA’s an overarching solution will be examined in order to collect appropriate and flagged feeds from appropriate fields in the SRA’s in order to enable a semi-automated process of constructing the OSRA. Hence a modular digital construction of the SRA linked (feeding) to the OSRA is to be envisaged.            In this way, expertise in developing</p>

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					<p>In this way, expertise in developing SharePoint based solutions is required. The technical solution has to take into account also the links with the CDP tool (also SharePoint) and the Architectural repository based on NAF v3. However, the specific technical solution is to be proposed by the contractor.</p>
15	03/12/2015 07:58	07/12/2015 10:13	Submission practicalities	<p>It is clear from the document checklist that the Technical Proposal must be submitted in one signed original and three copies + electronic copy on USB (once in p. 33 CD is also mentioned as alternative but elsewhere not). But what about the administrative information and the Financial Proposal? Only one original or copies for them too? P. 33 seems to suggest "triplicate" for the whole tender. Also, in view of the instructions on p. 32 on how not to handle the physical tender documents, is it appropriate using paper clips?</p>	<p><b>07/12/2015</b> As also mentioned in Annex 6.1 (Checklist of documents to be submitted), we confirm that only the technical proposal has to be submitted in "One signed original and three copies + One electronic copy". The rest of the documents have to be submitted in one signed original copy. In addition, we confirm that you may use paper clips.</p>

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16	05/12/2015 11:23	07/12/2015 16:52	D4.3 Audio-visual presentation...	According to the Specifications, the audio-visual presentation -- or at least the short videos forming part thereof, the reference in not entirely clear -- should be produced "in line with the communication guidelines applied in the EDA". We have not been able to find these guidelines. Could EDA provide a link or a short summary!?	<b>07/12/2015</b> The objective of the task is to develop the appropriate products to disseminate the work done under this contract, together with all the CapTechs. Therefore, power point presentations, infographics and short videos are expected, as for any other study or project developed. However, as the outcome is considered as an EDA product, the labelling has to be compliant with the communication guidelines applied in EDA. An example of them can be found in the EDA Graphic Charter uploaded on the document library. Further details will be provided to the contractor during the kick-off meeting.
17	07/12/2015 18:00	07/12/2015 18:03	Deadline for submission of tenders	What is considered to be the deadline for submission of tenders and when are tenders considered as respecting the deadline?	<b>07/12/2015</b> The deadline for submission of tenders is the date and time by which tenders <b>MUST BE RECEIVED BY EDA</b> .  In order to respect the deadline, the tenders must reach EDA (i.e. delivered at EDA) at the latest on the date and time of the deadline.