



**Title:** Framework contract for the provision of editing services for the European Environment Agency (EEA)

**Reference:** Call for tenders EEA/COM/15/004

**Closing date:** 31.3.2015

## **1 Introduction to EEA**

The European Environment Agency (EEA) is a European Union public body governed by Regulation (EC) No 401/2009 of the European Parliament and of the Council of 23 April 2009<sup>1</sup>. The EEA role is to support the European Union in the development and implementation of environmental policy by providing relevant, reliable, targeted and timely information on the state of the environment and future prospects. The EEA also provides the necessary independent scientific knowledge and technical support to enable the Union and the member countries to take appropriate measures to protect and improve the environment as laid down in the Treaty and by successive Community action programmes on the environment and sustainable development. Currently, the EEA has 33 member countries (the Member States of the European Union, Iceland, Liechtenstein, Norway, Switzerland and Turkey).

The EEA is the hub of the European Environment Information and Observation Network (Eionet), a network of around 350 organisations across Europe through which it collects and disseminates environment-related data and information, including European Topic Centres. The EEA and Eionet contribute to the European Shared Environmental Information System (SEIS), a distributed, integrated, web-enabled information system based on a network of public information providers sharing environmental data and information. It builds on existing e-infrastructure, systems and services in the Member States and EU institutions.

Further information about the work of EEA can be obtained on its website: <http://www.eea.europa.eu>.

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<sup>1</sup> OJEU L 126 of 21.5.2009, p. 13.

## 2 Presentation of the tender

Tenders shall 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 call for tenders reference No **EEA/COM/15/004**
- The contract title ***“Provisions of editing services for the EEA”***
- The name of the tenderer
- The indication ***“Tender – Not to be opened by the internal mail services”***
- The address for submission of tender (as specified in the letter of invitation to tender)
- The date of submission shall be legible on the outer envelope or parcel

The outer envelope or parcel must contain three inner envelopes, i.e. Envelopes No 1, 2 and 3, corresponding to the following three sections: administrative section, technical offer and financial offer.

**(a) Envelope No 1 – Administrative section** shall include the following:

- The Tender submission form drawn up in accordance with the template in annex 1
- The declaration on exclusion criteria as required under section 11.1.2 drawn up in accordance with the template in annex 2
- The legal entity form as required under section 11.2.1 drawn up in accordance with the template in annex 3
- The financial identification form drawn up in accordance with the template in annex 4
- The evidence and documentation demonstrating the fulfilment of the selection criteria as required under sections 11.2.2 (economic and financial capacity) and 11.2.3 (technical and professional capacity)

**(b) Envelope No 2 – Technical offer** shall include the following:

The technical offer providing all information requested under sections 6, 7 and 11.3.1 including information relevant to subcontracting as requested under section 4.3.

**(c) Envelope No 3 – Financial offer** shall include the following:

The financial offer providing all information requested under sections 10 and 11.3.2, drawn up in accordance with the template in annex 5.

Tenders shall be drafted in one of the official languages of the European Union, **preferably in English** (supporting evidence does not need to be translated) and submitted **in triplicate** (one signed original unbound and two copies).

It is 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.

Tenderers shall observe precisely the indications in points 2, 3, 4 and 6 of the letter of invitation to tender to ensure their tender are admissible. Late delivery will lead to the non-admissibility of the tender and its rejection from the award procedure for this contract. Offers sent by e-mail or

by fax will also be non-admissible and discarded. Envelopes found opened at the opening session will also lead to non-admissibility of the tender. Consequently, tenderers must ensure that their tenders are packed in such a way as to prevent any accidental opening during its mailing.

### **3 Confidentiality and protection of personal data**

For the processing of this tendering procedure, the EEA observes the rules set in Regulation (EC) No 45/2001 on the protection of individuals with regard to the processing of personal data by Community institutions and bodies and on the free movement of such data (OJEU L 8 of 12.1.2001, p. 1).

For further detailed information please refer to the privacy statement available on the EEA external website at the following address: <http://www.eea.europa.eu/about-us/tenders/privacy-statement>.

### **4 Participation in the tendering procedure**

Submission of a tender implies acceptance of the terms and conditions set out in the invitation to tender, in these tender specifications and in the draft service contract and general conditions attached as annexes (see annex 6) and, where appropriate, waiver of the tenderers own general or specific terms and conditions. If awarded the contract, it is binding on the tenderer for the duration of the contract.

#### **4.1 Eligibility**

This call for tenders is open on equal terms to all natural and legal persons from one of the 33 EEA member countries and to all natural and legal persons established in a third country which has a special agreement with the European Union in the field of procurement on the conditions laid down in that agreement<sup>2</sup>.

As proof of eligibility tenderers must indicate in the tender submission form (see annex 1) in which country they have their headquarters, registered office or residence, and provide the necessary supporting documents in accordance with their national law. If the tender is a natural person, he/she must provide a copy of identity card/passport or driving license and proof that he/she is covered by a social security scheme as a self-employed person.

#### **4.2 Application**

All eligible natural and legal persons (as per above) or groupings of such persons (consortia) may apply.

A consortium may be a permanent, legally established grouping or a grouping, which has been constituted informally for a specific tender procedure. If awarded the contract, the members of the consortium (i.e. the leader and all the other partners) will have an equal standing towards the EEA in executing the framework service contract and they will be jointly and severally liable to the EEA.

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<sup>2</sup> At this point in time, tenderers established in one of the following countries are eligible: EEA member countries, i.e. EU-28, Iceland, Liechtenstein, Norway, Switzerland and Turkey; and under the stabilisation and association agreements: FYROM, Albania, Montenegro and Serbia.

The participation of ineligible natural or legal 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 EEA will not request consortia to have a given legal form in order to be allowed to submit a tender, but reserves the right to require a consortium to adopt a given legal form before the contract is signed if this change is necessary for proper performance of the contract. This can take the form of an entity with or without legal personality but offering sufficient protection to the EEA contractual interests (depending on the member countries concerned, this may be for instance, incorporation or partnership or a temporary association). Consortia must identify one of their members as coordinator who will interface with the EEA.

Each member of a consortium must fulfil the conditions for participation mentioned in this section and section 4.1 above and provide the required documents listed in these tender specifications under sections 10.1 and 10.2 below. Therefore, each member of a consortium shall specify his role, qualifications and experience.

### **4.3 Subcontracting**

A contractor may subcontract part of the services.

Tenderers must state what part of the work, if any, they intend to subcontract, and to what extent (for instance % of the total contract value), specifying the names, addresses and legal status of the subcontractors. If subcontracting is **not** envisaged, tenderers shall clearly state so in the tender submission form (see annex 1).

Legal persons must provide a document containing a list of the professional qualifications of the subcontractors and statement of the means of confidentiality when subcontractors are used. If awarded the contract, the contractor may not choose subcontractors other than those mentioned in the bids unless he obtains the prior written authorisation of the EEA. The overall responsibility of the work remains with the contractor.

Tenderers shall acknowledge (see annex 1) that the EEA reserves the right to request them at a later stage to provide documentation in relation to exclusion and selection criteria for any proposed subcontractors (see sections 10.1 and 10.2 below).

If awarded the contract, the contractor must ensure that Article II.17 of the draft framework contract (see annex 6) can be applied to subcontractors. Once the contract has been signed, Article II.12 of the above-mentioned draft framework contract shall govern subcontracting.

## **5 Contractual terms and guarantees**

In drawing up bids, tenderers should bear in mind the provisions of the draft framework service contract attached to these tender specifications (annex 6).

Payment shall be made upon delivery and approval of the services requested, within 30 (thirty) calendar days upon receipt by the EEA of an invoice and any supporting document relating to the services carried out. In the case of tasks where the contractor has to bear substantial upfront costs or the execution of the task stretches over a large period of time, payment in instalments may be agreed.

The payment periods shall be further detailed in each order form according to the particularities of the service concerned.

No financial guarantee is requested.

## **6 Subject of the contract**

The EEA seeks to establish a contract with a service provider in the area of English language editing (including proof reading) of text for paper *and* the web in order to ensure that the Communications Programme within the EEA can manage fluctuating workload in this area, while maintaining high quality outputs.

For present purposes, the editing functions are defined as follows:

- *Editing* includes all the elements in proofreading but also includes improving the structure, clarity and readability of the text by redrafting or reordering text; removing repetitions; querying ambiguities; and, where appropriate, suggesting the addition, deletion or restructuring of whole sections in order to convey the core message more effectively.
- *Proofreading* comprises checking spelling, grammar, syntax and correct usage of terminology; applying the EEA style guide and formatting rules; checking the accuracy and consistency of references throughout the document; and ensuring a consistent structure of chapters and sections.

After proofreading or editing, the author may need to make small changes to the text in order to correct editorial changes or respond to the editor's queries about ambiguities. In such cases, the proof-reader or editor will normally review the document to check these corrections and finalise the text.

The work is primarily expected to comprise editing and proofreading (as defined above) of manuscripts for EEA reports and other communications products including web content, such that finalised texts communicate the core messages as effectively as possible and are fully in accordance with the EEA style rules (see annex 7). EEA report manuscripts are frequently drafted by more than one author and by non-native English speakers. A core task is therefore ensuring a high quality and consistent writing style throughout the document.

These tasks are to be carried out in close cooperation with the responsible staff in the Communications Programme and in some cases directly with responsible EEA Project Managers.

## **7 Mandatory requirements**

The tender shall clearly show:

- the consultant's views on, experience with (with examples) and insights into the tasks described in section 6 above, and set out an overall methodology to support the EEA in delivering the mentioned products efficiently and promptly, including a clear description of turnaround time from receipt of file (based on time it takes to edit one page document in word) to delivery of final edited document;
- the existence of a clearly defined quality assurance system designed to guarantee the quality of each edit before it comes back to the EEA;

- a table outlining clearly the steps involved in a typical editing job with a number of days allocated to each stage; for example, response time to initial request; initial review of product to assess the editing job (if this step is necessary); number of pages edited per day for a typical technical report, etc...

These elements will be assessed on the basis of the award criteria specified in section 10.3.1 below.

The team shall be made up of a minimum of:

- one experienced co-ordinator who will act as the EEA contact on all matters related to the contract, including the quality of the editing work;
- a team of experienced editors who have:
  - proven experience in editing environment-related texts with a policy dimension;
  - proven experience working with international organisation, preferably EU-related;
  - proven experience in using style guides, based on the EU's International Style Guide;
  - proven experience in using Zotero and relevant versions of Office applications;
  - proven ability to use and implement a Microsoft Office Word template designed and provided by an existing customer;
  - a clear commitment to quality and who apply a strict quality control regime for each completed edit that checks the quality of each edit before it is sent to the EEA.

The experience of the team members will be assessed on the basis of the selection criteria specified in section 11.2.3 below, whereas the composition of the team and the quality control measures will be assessed on the basis of the award criteria specified in section 10.3.1 below.

## **8 Place of performance**

The services shall mainly be performed at the contractor's own premises, with occasional meetings (estimated three meetings for one person per year) at the EEA in Copenhagen. Other meetings will be done by video/telephone-conference.

## **9 Type and volume of contract**

The successful tenderer will be awarded a framework service contract for an initial period of 12 (twelve) months starting from the date of signature, with the possibility of maximum three renewals for a period of 12 (twelve) months each. The services will be implemented through order forms detailing the tasks to be performed and the resource to be allocated depending on the EEA's needs. Based on the EEA's current level of activities and anticipated future demand the estimated maximum budget available, including all tasks specified in section 6 above, is EUR 250,000.00 (two hundred fifty thousand euro) over a maximum period of 48 (forty eight) months covering all services and travel specified above.

## **10 Price**

Tenderers are required to quote prices for the services to be provided as follows:

- Prices quoted must be **all-inclusive** (i.e. inclusive of all costs involved in the performance of the contract (e.g. of management, administrative and travel costs)) and **expressed in euro**,

including for tenderers established in countries that are not part of the Eurozone. For tenderers in countries that do not belong to the Eurozone, the price quoted may not be revised in line with exchange rate movements. It is for the tenderer to select an exchange rate and assume the risks or the benefits deriving from any variation. Tenderers shall give details of the price according to the requirements specified in section 11.3.2 below and in the price quotation form attached as annex 5 to these tender specifications.

- o No additional expenses incurred in the performance of the services will be reimbursed separately by the EEA.
- o The price quoted must be fixed and not subject to revision during the first year of duration of the contract.

From the beginning of the second year of duration of the contract, 80% of the prices may be revised upwards or downwards each year, where such revision is requested by one of the contracting parties by registered letter no later than 3 (three) months before the anniversary of the date on which it was signed.

The EEA shall purchase on the basis of the price in force on the date on which specific contracts are signed. Such prices shall not be subject to revision.

The revision shall be determined by the trend in the harmonised indices of consumer price (HICP) published by the European Commission on Eurostat web page at <http://ec.europa.eu/eurostat/data/database> (Theme – Economy and Finance; Prices (prc); Harmonised indices of consumer prices (HICP) (prc\_hicp); HICP (2005=100) – monthly data (index) (prc\_hicp\_midx); GEO – Euro area (EA11-2000, EA12-2006, EA13-2007, EA15-2008, EA-16-2010, EA17-2013, EA18).

Revision shall be calculated in accordance with the following formula:

$$Pr = Po \times (0,2 + (0,8 \times Ir/Io))$$

Where:

Pr = revised price;

Po = price in the original tender;

Ir = index for the month corresponding to the date of receipt of the letter requesting a revision of prices;

Io = index for the month in which the validity of the tender expires.

Under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities and the Headquarters Agreement between the Agency and the Government of Denmark of 17 August 1995, the EEA is exempt from all charges, taxes and dues, including value added tax; such charges may not therefore be included in the calculation of the price quoted; the VAT amount must be indicated separately.

The costs incurred in preparing and submitting the tender shall be borne by the tenderer and cannot be reimbursed.

## **11 Criteria**

### **11.1 Exclusion criteria**

#### **11.1.1 Exclusion from participation and award in the procurement procedure**

To be eligible to participate in this contract award procedure, tenderers must not be in any of the exclusion situations referred to in Articles 106 and 107 of the Financial Rules applicable to the general budget of the European Union<sup>3</sup>.

#### **11.1.2 Evidence to be provided**

When submitting their bids, each tenderer (including any sub-contractor or any member of a consortium) must provide a declaration on their honour in accordance with the form attached as annex 2, duly signed and dated, stating that they are not in any of the situations mentioned under paragraph 11.1.1 above.

The tenderer to whom the contract is to be awarded will be required, prior to the signature of the contract, to provide the evidence specified in the penultimate paragraph of the declaration of honour mentioned above (see annex 2).

### **11.2 Selection criteria**

#### **11.2.1 Legal capacity**

Any tenderer is required to prove that he is authorised to perform the contract under 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.

To that effect, each tenderer (including any sub-contractor or any member of a consortium) is required to submit a legal entity form (see annex 3) duly filled out and signed, accompanied by a copy of inscription in a trade register and/or a copy of inscription in a VAT register, where applicable. However, the sub-contractor(s) shall not be required to fill out or provide those documents when the services provided represent less than 20% of the contract value.

#### **11.2.2 Economic and financial capacity**

Evidence of economic and financial capacity shall be furnished by one **(or more)** of the following documents:

- appropriate statements from banks or evidence of professional risk indemnity insurance;  
OR
- the presentation of balance sheets or extracts from balance sheets for at least the last 2 (two) years for which account have been closed, where publication of the balance sheet is required under the company law of the country in which the economic operator is established; OR
- a statement of overall turnover and turnover concerning the services covered by the contract during the last 2 (two) financial years.

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<sup>3</sup> Regulation (EU, Euratom) No 966/2012 of the European Parliament and of the Council of 25.10.2012 on the financial rules applicable to the general budget of the Union and repealing Council Regulation (EC, Euratom) No 1605/2002, OJEU L 298/1 of 26.10.2012.

If, for some exceptional reason, which the EEA considers justified, a tenderer is unable to provide the references requested above, he may prove his economic and financial capacity by any other means which the EEA considers appropriate.

An economic operator may, where appropriate and for a particular contract, rely on the capacities of other entities, regardless of the legal nature of the links which it has with them. It must in that case prove to the EEA that it will have at its disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place those resources at its disposal.

### **11.2.3 Technical and professional capacity**

Tenderers should show their degree of technical and professional capacity to carry out the requested tasks as mentioned in section 6 above by providing information on the criteria described below.

If several service providers or sub-contractors are involved in the tender, the selection criteria for the technical and professional capacity will be assessed in relation to the combined capacities of the service providers and sub-contractors, as a whole, to the extent that service providers or sub-contractors put their resources at the disposal of the tenderer for performance of the contract.

The tenderer shall provide the following documents:

- **Human resources:**

CVs detailing the educational and professional qualifications of the tenderer's managerial staff as well as those of the staff designated to provide the services including language skills and indicating the required professional experience as follows:

1. Managerial staff: minimum 1 CV documenting a minimum of 5 (five) years' relevant experience as contract manager, including written skills in English;
2. Senior editors: minimum 2 CVs, each documenting a minimum of 5 (five) years' relevant experience as senior editor, including written skills in English;
3. Junior editors: minimum 2 CVs, each documenting a minimum of 2 (two) year's relevant experience as junior editor, including written skills in English.

- **Past contracts:**

Tenderers shall provide an overview of their experience with editing, indicating the value, dates, brief description of the services provided and recipients of the services (public or private), under the following two categories: (1) contracts currently undertaken; and (2) contracts that have been undertaken over the last 3 (three) years.

- **Environmental policy:**

Tenderers shall provide a description of their environmental policy specifying the status of implementation. In the event of a joint offer submitted by a consortium, **each** member of the consortium shall provide the requested description.

### **11.3 Award criteria**

The assessment method that will be used to determine the choice of the tender will be based on the criteria given below, on the basis of the most economically advantageous tender in terms of:

- Quality of the tender (Technical merit – TM)

- Financial value of the tender (Price – P)

**11.3.1 Technical merit (TM) (max. 70, min. 45 points)**

Tenders will be evaluated following the award criteria and weightings outlined below, producing a potential total score of 70 points.

Tenderers shall elaborate on all criteria referred to below in order to score as many points as possible. The mere repetition of mandatory requirements set out in these tender specifications, without going into details or without giving any added value will only result in a low score. If essential elements of these tender specifications are not expressly addressed in the tender, the EEA may decide to give a zero mark for the relevant quality criterion.

No	Award criteria	Maximum points (70)	Minimum points (44)
1	<p><b><i>Understanding of the objectives of the contract and the work to be carried out</i></b></p> <p>1. Tenders will be evaluated in terms of their appreciation and understanding of the aims and context of the work to be undertaken as documented:</p> <ul style="list-style-type: none"> <li>- in a short description (max. 10 A4 pages) highlighting the proposed methodology to provide the required services in an efficient and timely manner. This will indicate the steps involved in a typical editing job, the turnaround time from receipt of a file (based on the time it takes to edit a one page document in word) to the delivery of the final edited document, the tools, software and applications to be employed for performing the services.</li> <li>- in the quality of work based on a two-page sample of text <u>edited</u> in track changes with comments (*).</li> </ul> <p>2. Tenders will also be evaluated in terms of their overall quality, completeness and presentation.</p>	30	15
2	<p><b><i>Management approach in terms of organisation, flexibility and service orientation</i></b></p> <p>Tenderers shall provide a short description (max. 5 A4 pages) of the way in which the provision of the services will be organised. This will include contract management, availability and adequacy of the resources for the timely completion of the contractual tasks to a high level of quality, responsiveness and interaction with the EEA, adaptability to</p>	20	15

	specific editing needs, proposed approach to ensure continuous customisation of the services to meet EEA's requests and ability to deal with bottlenecks.		
3	<p><b>Quality assurance and control</b></p> <p>Tenderers shall provide a short description (max. 5 A4 pages) of the measures employed to ensure the quality of the services, indicating the quality checks carried out on each transcript before it is sent back to the EEA.</p>	20	6

(\*) The sample task referred to in award criterion No 1 is attached as annex 8 to these tender specifications.

Only tenders which obtain the indicated minimum number of points, both for each award criterion and in total, will be considered for the next stage, which involves determining the financial value of the tender and for the final assessment.

### 11.3.2 Price (P) (max. 30 points)

Tenderers are requested to submit a financial offer giving the **all-inclusive** (i.e. including all relevant costs and expenditures (e.g. management, administrative, travel costs, etc.) and covering all the tasks listed under section 6 above) fixed prices **in euro** for the following:

(P<sub>1</sub>) total rate per page in Word for a standard edit for senior editor

(P<sub>2</sub>) total rate per page in Word for a standard edit for junior editor

(P<sub>3</sub>) total rate per page in Word for a complex edit for senior editor

(P<sub>4</sub>) total rate per page in Word for a complex edit for junior editor

(P<sub>5</sub>) total rate per page in Word for a proofread

For that purpose, tenderers shall fill out the price quotation using the template attached in annex 5 to these tender specifications. Tenderers shall bear in mind that all fields are compulsory and non-compliance will lead to exclusion of the tender from the award process.

For each category above, tenders meeting all mandatory requirements including the minima for technical merit will score points in function of the following formula  $P_s = (P_{min}/P_0) \times 30 \times WF$ , where:

$P_s$  = Price Score for price of service,

$P_{min}$  = the price of the lowest tender received,

$P_0$  = the price of the tender being considered,

40 = the maximum number of points that can be awarded under this award criterion

WF = weighing factor; the prices P<sub>1</sub> and P<sub>3</sub> will each be affected by a weighing factor of 25%, whereas P<sub>2</sub> and P<sub>4</sub> will each be affected by a weighing factor of 20% and P<sub>5</sub> will be affected by a weighing factor of 5%.

The total score for the price criterion that will be taken into account for the evaluation of tenders will be the sum of the 5 (five)  $P_s$ .

### **11.3.3 Final assessment**

A framework service contract will be awarded to the tenderer whose tender achieves the highest total score for technical merit and price (TM + P). Should tenders obtain the same final score and tie for first place, the tender will be awarded on the basis of the highest score achieved for price.

## **12 Performance**

Once the framework service contract has been signed, the contractor must be able to offer editors with the required skills and experience to carry out the requested tasks within five calendar days after having received an order form.

Competence in both selection and award criteria must be maintained throughout the framework service contract. Should the contractor fail to do this during the validity of the framework service contract, the EEA reserves the right to refuse any editor if performance is not satisfactory and/or to choose another vender from the tenders.

## **13 Environmental Considerations**

The EEA runs a certified environmental management system (EMAS) and aims to minimise the environmental impact of all its activities, including those carried out under contract. The future contractor will, therefore, be requested to consider the EEA environmental management guidelines in the implementation of the contract, in particular, those relating to business travel, electronic means of communication, paper and energy consumption. Further information on the EMAS system can be found on the EEA homepage:

<http://www.eea.europa.eu/documents/emas>.

Moreover, it is strongly recommended that tenders are submitted in an environmentally friendly way, e.g., by choosing a simple and clear structure (list of contents and consecutive page numbering), double-sided printing, limiting attachments to what is required in the technical specifications (no additional material) and avoiding plastic folders or binders.

## **14 Annexes**

- Annex 1: Tender submission form
- Annex 2: Declaration on exclusion criteria
- Annex 3: Legal entity form
- Annex 4: Financial identification form
- Annex 5: Price quotation
- Annex 6: Draft framework service contract and draft order form
- Annex 7: EEA Writing Guidelines
- Annex 8: Sample task