



Publications Office

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Resources Directorate
Calls for Tender & Contracts Unit

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Réf: ZR – AO 10221 – Additional information no 4
Opoce r.2 (2009) n° sauvegarde 90461 / ARES

FAX + REGISTERED LETTER

Subject: Call for tender n° 10221 – Additional Information number 4

Title: Provision of consultancy services regarding SGML, XML and HTML matters

Ref: Requests for additional information of 23/04 [77492 and 78129]
Request for additional information of 24/04 [78708] and of 27/04 [79244]

Dear Sir or Madam,

Concerning the above-mentioned Call for Tender, after having received some questions from tenderers, we are informing you of the following:

Q1: *SPECIFICATIONS – Invitation to tender – section 1.2 Nature of the contract – page 4/81, “As exact implementing conditions, quantities and/or delivery times cannot be indicated in advance, the Commission intends to conclude a framework contract, which shall establish the basic terms for a series of Order Forms (“Orders”) or Specific Contracts to be issued or concluded over its duration.”*

Question:

Could you please clarify the difference between an Order and a Specific Contract?

A1: **An Order Form is a simplified form of a Specific Contract, usually issued for ordering services defined in the Specifications of the framework contract.**

Q2: SPECIFICATIONS – Invitation to tender – Annex 9 – CV summary – page 46/81Questions:

According to our understanding the Tenderer should fill the column 'Ref. nr.' with the 'CV No.' corresponding to the CV of each person presented in the table of the CV summary. Please confirm that our understanding is correct.

A2: Your understanding is correct.

Q3: SPECIFICATIONS – Invitation to tender – section 4 Technical Specifications – paragraph 4.1.2 Detailed description of the requested services – page 20/81, “Management of the Formex helpdesk: assistance for the preparation of answers to questions concerning the correct and harmonized use of the Formex specifications within strict predefined delays.”

SPECIFICATIONS – Invitation to tender – Annex 12 Quality expectations and service proposals – section 12.4 Tenderer's approach to provide services requested under this Call for Tenders – page 51/81

Questions:

- a) *Could you please specify the current helpdesk mechanism in which the Contractor will contribute? In particular we would like to know:*
 - 1) *How the questions/issues addressed to the current helpdesk are managed (i.e. who receives the questions, how are they handled etc.)?*
 - 2) *By whom and to whom (e.g. actors: Commission's IT staff, Commission's departments etc.) are the questions addressed?*
 - 3) *Is there a specific tool/mechanism used for the current helpdesk organisation, as well as for the dissemination of questions and answers?*
 - 4) *Is there a current archive of the question and answers that the helpdesk has already handled? How is this archive implemented?*
- b) *Could you please clarify whether the Contractor will be responsible for the Formex Helpdesk or will the Contractor merely provide assistance for the preparation of the answers to questions? We would also like to know whether the Contractor will have to undertake further activities (e.g. management activities) apart from the assistance for the preparation of answers to questions. Please elaborate on the responsibilities of the Contractor regarding the Formex Helpdesk (i.e. set up of the helpdesk mechanism, procedures and tools etc.)*
- c) *According to the specifications, the Contractor may be asked to execute helpdesk services inside the Office's premises or within the Contractor's premises. In each case, could you please clarify whether the Contractor will have to set up a helpdesk tool that will also communicate with the Office's current helpdesk mechanism or will the Contractor take-over the current helpdesk mechanism (e.g. tools, current question archive etc.)?*
- d) *Could you please specify who will undertake the expenses for the set up of the helpdesk mechanism (tools, environment etc.) in the case of Fixed Price projects, as well as in the case of Time & Means projects?*

A3: a1) External users' requests are sent via the Publications Office, whereas internal ones are sent directly to the help-desk. Answers which are prepared by the help-desk, are sent

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– following their validation by the Publications Office - to the requester with a copy to other services in chain.

a2) See additional information no 2, answer to question no 13.

a3)+a4) See Additional Information no 3, answer to question no 1.

b) See answer a1) and additional information no 3, answer to question no 1.

c) See Additional information no 3, answer to question no 1.

d) Work executed on its premises will be the contractor's responsibility. The Publications Office will provide a working post for in-house work.

Q4: *SPECIFICATIONS – Invitation to tender – Annex 12 Quality expectations and service proposals – section 12.4 Tenderer's approach to provide services requested under this Call for Tenders – page 51/81, "Questions will be sent by fax or as electronic messages. The Office will receive the questions. Afterwards they are forwarded to the helpdesk."*

Questions:

a) *Could you please clarify whether the Contractor will also receive the forwarded questions in the form of fax or electronic messages by the Office?*

b) *Could you clarify whether electronic messages refer to e-mails or to electronic messages that derive from the functionality of a tool used by the Office?*

A4: a)+b) **The Contractor will receive a question by fax, or by electronic message (e-mail).**

Q5: *SPECIFICATIONS – Invitation to tender – section 4.2 Working method – paragraph 4.2.1.1 Fixed Price Projects – page 21/81, "The project plan has to reference clearly all actions demanding the active participation of the Office, such as interviews, installation or validation periods."*

Questions:

Could you please provide us with further clarifications on the envisaged interviews and installation activities that the Office will perform in the context of Fixed Price Projects?

A5: **Interviews and installation are examples of the activities, which might be requested by the Publications Office as part of the project plan. Consequently, in the project plan all the activities requested from the Publications Office, including - if necessary - examples as set out on page 21 of the Specifications, shall be mentioned.**

Q6: *SPECIFICATIONS – Invitation to tender – section 4.2 Working method – paragraph 4.2.1.1 Fixed Price Projects – page 21/81, "For software deliverables and the related documentation, the acceptance period will take up to 30 working days."*

Questions:

According to our understanding the activities under the envisaged framework contract include consultancy and assistance activities. Could you please clarify whether the Contractor will also undertake the execution of orders for software development as well? If yes, which profile (TEC-CONS XML or ANA XML) will carry out the implementation of the software deliverables? Could you please provide us with specifications for the software

development tasks that the Contractor will undertake as well as the envisaged software deliverables?

A6: There will be no software development under this Contract except for XML grammars (DTD, XML Schema (W3C)) and stylesheets (XSLT, XSLFO)

Q7: *SPECIFICATIONS – Invitation to tender – section 4.2 Working method – paragraph 4.2.1.1 Fixed Price Projects – page 21/81, “For software deliverables and the related documentation, the acceptance period will take up to 30 working days.”*

SPECIFICATIONS – Invitation to tender – section 4.2 Working method – paragraph 4.2.1.1 Fixed Price Projects – page 21/81, “The acceptance period consists of three consecutive phases: an installation phase of up to five working days, a test phase of up to 20 working days, and a wrap-up phase of up to five working days in order to establish the acceptance protocol. The Office may request the support of the contractor in case of problems during the installation phase, without supplementary charges.”

Questions:

According to our understanding, the Office will carry out the installation for the software deliverables, the activities of the testing phase as well as the wrap-up phase that includes the establishment of the acceptance protocol. Please confirm that our understanding is correct.

A7: See answer to the question no 6.

Q8: *SPECIFICATIONS – Invitation to tender – Annex 1 Price Schedule and Estimation Form – page 25/81, “For fixed price and time means project if any work is to be done outside the contractor’s premises, on the premises of the Publications Office, EU Institutions, bodies or its agents in Brussels, Luxembourg or Strasbourg, mission expenses will not be taken into account.”*

Questions:

We understand that the mission expenses must not be included in the proposed rates since they will be covered by Office. Please confirm that our understanding is correct.

A8: The tenderers shall provide two separate prices - for provision of the intra muros, and for provision of extra muros services. As already mentioned in the Price Schedule and Estimation Form provided prices shall be "all inclusive net of taxes".

Fourth bullet of the Price Schedule and Estimation Form informs tenderers, that mission expenses will be taken into account (reimbursed), only if the work is to be done outside their premises, or outside premises of the Publications Office, EU Institutions, bodies or its agents in Brussels, Luxembourg or Strasbourg.

Q9: *SPECIFICATIONS – Invitation to tender – Annex 8 CV Form – page 40/81, “Other software and methods could be added to the software/method expertise page.”*

Questions:

a) Could you please inform us whether there are specific thresholds (in months) regarding the required expertise per software/method for each profile? If yes, please provide us with these thresholds.

b) *According to our understanding the Tenderer may add rows to the list of the software/method expertise page in order to indicate the experience of a candidate in other software/methods than these provided in the list. Please confirm that our understanding is correct.*

A9: a) **It is up to the tenderer to assess the expertise of the proposed person and to provide this information in the relevant column of the CV.**

b) **Your understanding is not correct. Adding an additional row to the list of the software/method expertise page is not allowed.**

Q10: *Call for Tender 10221 – reply to request for clarification D + E + F – Answer 1, “The services for the helpdesk Formex request a full time presence in the premises of the Publications Office and the services relating to the assistance ProCat request “only” a part time presence.”*

Questions:

Could you please provide us with the definition of ‘assistance ProCat’?

A10: **In the context of ProCat XML instances are sent to various services. They generally consist of bibliographic notices. The foreseen tasks may include analysis and correction of such notices. Experience in metadata (bibliographic and documentary) could be helpful.**

Q11: *SPECIFICATIONS – Invitation to tender – section 2.7 Section four: award criteria – technical bid – paragraph 2.7.1 Documents to provide concerning the technical award criteria - page 12/81, “In case where a submitted document, including its table of content, figures, graphs, examples, annexes, and all other additional information, exceeds maximum limits as set out above only the first 15 or 20 pages will be evaluated.”*

Questions:

According to the specifications, figures and graphs will have to be included in the page limits set for the answers to the award criteria. In this case, the Tenderer is demotivated to use such graphical elements that may consume space in the document, while playing a merely explanatory role. Moreover, the Tenderer is encouraged to minimize the size of graphical elements in the document, thus impairing their clarity. Could you please clarify whether graphical explanatory elements could be considered to consume less space in the documents than their actual size? For example, in previous CfT of the Office, five graphical elements independently of their size correspond to one page. Is this consideration applied in the specific CfT?

A11: **We would like to confirm the requirements concerning the size of the documents as set out in the Specifications. It is up to the tenderer to decide – respecting page limits – if he is going to present its approach in text and graphic form.**

Moreover, we would like to point out that all the requirements to be found in the Specifications for AO 10221 are related only to the call for tenders in question, and they shall not be compared to the requirements specified for any other – past or future – call for tenders.

Q12: *Subject: Specifications, Section 4.2.1.1 Fixed Price Projects*

Question You write that fixed price projects should normally be executed in the contractor's premises, with a project leader nominated by the contractor to be the principal contact with the Office.

a) Our understanding is that this project leader will be the single point of contact between the Office and the contractor. Is it correct?

b) In case answer to question a) is positive, our understanding is that only the project leader is required to be skilled in English and in French. The resources being part of the team under the project leader's responsibility are not required to be good in both English and French. They are of course required to be able to communicate effectively with the project leader. Is it correct?

c) In case answer to question a) is negative, what kind of interaction do you expect between the team members working at the contractor's premises and the Office ?

A12: a)+c) The project leader will be a single contact point for all the administrative matters. For technical issues technical staff (TEC-CONS-XML and ANA-CONS-XML) will be contacted directly.

b) Your understanding is not correct - the minimum level of English and French language skills required is, at least 'Good' for all the technical staff, irrespective of the working place.

Q13: *Subject: Additional information n° 2 - Question 3*

Question: In your answer to question 3 about the required level of language skills in English and French, you answered that it had to be at least "Good" in both languages. Does this apply equally to all candidate resources, either working intra muros or working extra muros ? All the ANA-CONS-XML and TEC-CONS-XML, irrespective of the working place shall have at least good knowledge of EN and FR.

A13: See answer to the question no 12 b).

Q14: SPECIFICATIONS – Invitation to tender – Annex 12 Quality expectations and service proposals – section 12.2 Tenderer's approach to quality assurance, to consulting and to project management - page 50/81, "If the tenderer has obtained a certification of his quality procedures conforming to the EN29000 (ISO 9000) series of quality standards or equivalent standards, he has to enclose a copy of the certificate. The tenderer must specify the year and the country for which the accreditation has been obtained, state the name of the certification body, and specify if there have been any follow-up audits."

Questions:

Could you please clarify whether this copy of certificate should be annexed to the second award criterion document 'Tenderer's approach to quality assurance, to consulting and to project management'?

- If yes, we understand that the annexed certificate(s) is (are) not included in the applied maximum number of 15 pages. Please confirm that our understanding is correct.
- If not, please explain in which section of the tender this copy of certificate should be inserted.

A14: As already mentioned in the Specifications, a certificate shall be attached to the document for award criterion no 2. The certificate is not included in the pages number limit for the above-mentioned document.

Q15: SPECIFICATIONS – Invitation to tender – Annex 12 Quality expectations and service proposals – section 12.3 Draft Service Level Agreement - page 51/81, “The description must contain the description of the procedures, the tenderer foresees to handle the different types of change, which may occur during the realization of a project.”

Questions:

We understand that the “different types of changes”, are referred to the Tenderer’s change management approach. Please confirm. In order the tenderers to be able to specify in detail their approach, could you please specify in detail to what changes are you referred to (please provide us with an example)?

A15: Your understanding is not correct. As already mentioned in the Specifications, and quoted in the question above, the tenderer shall describe how he is going to “handle the different types of change, which may occur during the realization of a project”. It is up to him to decide what kind of changes may occur during the execution of the project and if, and how, he is going to present its approach to them.

Q16: CLARIFICATION – Additional Information no 2 – Question & Answer 9;

CLARIFICATION – Additional Information number 3 – Question & Answer 9;

SPECIFICATIONS – Invitation to tender – Annex 12 Quality expectations and service proposals – section 12.2 Tenderer’s approach to quality assurance, to consulting and to project management - page 50/81;

SPECIFICATIONS – Invitation to tender – Annex 12 Quality expectations and service proposals – section 12.3 Draft Service Level Agreement - page 50-51/81.

Questions:

According to the clarification, the Tenderer’s approach to project management will be included only in the third award criterion document that presents the Tenderer’s proposal for the Draft Service Level Agreement. As a result, the second award criterion document will only present the Tenderer’s approach to quality assurance and consulting, as specified in section 12.2 of Annex 12 (page 50/81). Please confirm that our understanding is correct.

A16: Your understanding is correct.

Q17: SPECIFICATIONS – Annex 7 PARF – Cover Page - page 38/81.

Questions:

a) In the cover page of the PARF template, the Tenderer should provide the number of man-days per profile for a list of the profiles that participated in the project. The profiles indicated by the template are:

- TEC-CONS-XML
- ANA-CONS-XML

- **OTHER**

Should the Tenderer provide cumulative numbers of man-days for other profiles than the TEC-CONS-XML and ANA-CONS-XML or should the Tenderer precisely add other profiles involved in the project and present their participation in number of man-days?

b) We understand that the Tenderers should correspond the profiles of the submitted project references to the profiles TEC-CONS-XML and ANA-CONS-XML as requested by the PARF template in accordance with their actual roles and responsibilities. For example, a previous project requested instead of a TEC-CON-XML, an IS Consultant which implemented similar activities. The Tenderer should allocate the person days of the later to the TEC-CON-XML profile.

c) In the cover page of the PARF, the Tenderer should provide staff references (name, profile, CV-Forms number). According to our understanding, the Tenderer should include CV-Forms number only for the persons proposed in the CV section of the selection criteria. The Tenderer will not include any other CVs in the tender. Please confirm that our understanding is correct.

A17: a) As already indicated on the PARF form the tenderer shall provide cumulative number of man-days for profiles other than TEC-CON-XML and ANA-CONS-XML.

b) Yes, in the situation as described in the question.

c) Your understanding is correct.

Q18: *SPECIFICATIONS – Annex 7 PARF – Information Page – footer 5 - page 39/81, “Proposed PARFs shall cover methodologies / tools / OS / hardware / software, which are specified at the CV expertise page”.*

Questions:

We understand that the proposed PARFs should cover the majority of the methodologies / tools / OS / hardware / software listed at the CV expertise page or equivalent of them. Please confirm that our understanding is correct.

A18: It is correct that the proposed PARFs shall cover methodologies / tools / OS / hardware / software listed on the CV expertise page.

Q19: *Specifications, 4.2 Working Method, p. 21/81*

Questions:

Could you please specify the organisation the Office intends to put in place on its behalf during the execution of the contract? Will a project leader be designated only for Time and Means assignments or is a Project Leader is also foreseen to be designated by the Office for the off-site assignments as well?

A19: The Publications Office will nominate a project manager for each project.

Q20: *Specifications, Annex 10, Profile’s Definitions AND Tender’s Additional Information*

Questions:

With regards to the Office’s answers to clarification nr 11 of Set 2 and clarification nr 8 of Set 3, there seems to be a discrepancy as regards the requirements for the requested profiles.

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In the first question of interest, the Office requires both experience in XML and SGML while in the second, experience in either technology is acceptable.

Could you please clarify this point, explicitly specifying the years of experience that the proposed experts must have in each technology, in order to meet the Office's needs.

A20: There is no discrepancy, as you are suggesting, in the question. Required experience is already explicitly mentioned in additional information no 3, answer to question no 8.

Q21: *Specifications, Annex 10, Profile's Definitions AND Tender's Additional Information*

Questions:

With regards to the Office's answers to clarification nr 7 of Set 3, we would appreciate the Office's elaboration on the term "expertise". Our understanding is that an expert that covers the professional experience required for the ANA-XML profile, possesses the expertise in the relevant technology and therefore fully covers the Office's requirements. Please confirm that this understanding is indeed correct, or provide us with specific details as regards the criteria that the Office intends to use to assess the expertise of the submitted CVs.

A21: The term "expertise" refers to the professional knowledge of the proposed person, which will be evaluated against requirements as set out in the Specifications, Annex 10.

See also additional information no 3, answer to question no 7.

Q22: *Specifications, 4.2.2 Language Constraints, "The required services must be provided in English and in French", p.23.*

Questions:

The effort breakdown presented in the Estimation Form of Annex 1 indicates that out of the 4 ANA-XML experts (full time dedication) to be involved in the contract, only one will be called to work on-site. It is fact that the majority of the proposed experts will not need to use French in the execution of the contract services, taking for granted that all contract deliverables will be drafted in English.

Therefore, it is our rightful understanding that Tenderers could indicate which of the proposed experts for the ANA-XML profile will undertake the on-site work and propose experts that do not have French knowledge for the rest of the positions. Please confirm that our understanding is correct and aligned with the contract's requirements. The question is valid for the TEC-CONS-XML profile.

A22: It is clearly indicated in point 4.2.2. of the Specifications that requested services shall be provided in English and in French. Consequently, the following statement to be found in the above mentioned question *"It is fact that the majority of the proposed experts will not need to use French in the execution of the contract services, taking for granted that all contract deliverables will be drafted in English"* is absolutely incorrect.

The Specifications clearly require that the proposed technical staff shall have a knowledge of English and French. See also answer to question no 12 above, as well as additional information no 2, answer to question no 3.

This answer is valid for both profiles.

Q23: *Section 4.1.2 Considering the annual workload estimation provided, can you provide us with an indicative split by percentage of:*

- *Consulting/Study/Survey work with respect to XML and derived standards,*
- *XML design, development and validation,*
- *Maintenance and helpdesk support tasks?*

A23: **Approximately 60% of the tasks will be related to the help-desk activities. The other 40% will be related to the other activities mentioned in the question.**

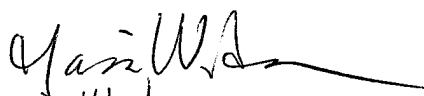
Q24: *Section 4.2.2 For Fixed Price and Extra Muros assignments, knowledge of both French and English languages is also mandatory?*

A24: *See answer to question no 12 b).*

Q25: *Section 4.1.2, 'Excellent knowledge of the Formex standard', Is a strong expertise in XML language answering the request as it's the language used for Formex standard?*

A25: **Strong expertise in XML is a basis for working with the Formex standard. See also the Specifications, point 12.4, first paragraph.**

Yours faithfully,


Maria Westerwau
António CARNEIRO
Head of Unit