CALL FOR TENDERS

N° MOVE/D1/2013-885

Service contract regarding e-Freight implementing measures.
Support measures to improve the efficiency of information exchange in multimodal freight transport

TENDER SPECIFICATIONS
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1. INFORMATION ON TENDERING

1.1. Participation

Participation in this tender procedure is open on equal terms to all natural and legal persons coming within the scope of the Treaties and to all natural and legal persons in a third country which has a special agreement with the Union in the field of public procurement on the conditions laid down in that agreement. Where the Multilateral Agreement on Government Procurement\(^1\) concluded within the WTO applies, the participation to the call for tender is also open to nationals of the countries that have ratified this Agreement, on the conditions it lays down.

1.2. Contractual conditions

The tenderer should bear in mind the provisions of the draft contract which specifies the rights and obligations of the contractor, particularly those on payments, performance of the contract, confidentiality, and checks and audits.

1.3. Joint tenders

A joint tender is a situation where a tender is submitted by a group of economic operators (consortium). Joint tenders may include subcontractors in addition to the joint tenderers.

In case of joint tender, all economic operators in a joint tender assume joint and several liability towards the Contracting Authority for the performance of the contract as a whole.

These economic operators shall designate one of them to act as leader with full authority to bind the grouping or the consortium and each of its members. It shall be responsible for the receipt and processing of payments for members of the grouping, for managing the service administration and for coordination. The composition and constitution of the grouping or consortium, and the allocation of the scope of tasks amongst the members, shall not be altered without the prior written consent of the Commission.

The tenderers should indicate in their offer whether the partnership takes the form of:

a) a **new or existing legal** entity which will sign the contract with the Commission in case of award

or

b) a group of partners not constituting a new legal entity, who via a **power of attorney**, signed by an authorised representative of each partner (except the lead partner), designate one of the partners as lead partner, and mandate him as lead contractor to sign the contract with the Commission in case of award.

\(^1\) See [http://www.wto.org/english/tratop_e/gproc_e/gp_gpa_e.htm](http://www.wto.org/english/tratop_e/gproc_e/gp_gpa_e.htm)
1.4. **Subcontracting**

Subcontracting is permitted in the tender but the contractor will retain full liability towards the Contracting Authority for performance of the contract as a whole.

Tenderers must give an indication of the part of the services and proportion of the contract that they intend to subcontract.

Tenderers are required to identify subcontractors whose share of the contract is above 20%.

During contract execution, the change of any subcontractor identified in the tender will be subject to prior written approval of the Contracting Authority.

1.5. **Content of the tender**

The tenders must be presented as follows:

Part A: Identification of the tenderer (see section 1.6)

Part B: Evidence for exclusion criteria (see section 2.2)

Part C: Evidence for selection criteria (see section 2.3)

Part D: Technical offer (see section 2.5)

Part E: Financial offer (see section 2.6)

Part F: Power of attorney (for consortia only)

1.6. **Identification of the tenderer: legal capacity and status**

- The tenderer's identification form in Annex 1 shall be filled in and signed by:
  - The tenderer (including any member of a consortium or grouping)
  - Subcontractor(s) whose share of the work represent more than 20% of the contract.

- In order to prove their legal capacity and their status, all tenderers (including any member of a consortium of grouping) must provide a signed **Legal Entity Form with its supporting evidence**. The form is available on: [http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm](http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm)

  Tenderers that are already registered in the Contracting Authority’s accounting system (i.e. they have already been direct contractors) must provide the form but are not obliged to provide the supporting evidence.

- If it has not been included with the Legal Entity Form, tenderers must provide the following information:
  - For legal persons, a legible copy of the notice of appointment of the persons authorised to represent the tenderer in dealings with third parties and in legal proceedings, or a copy of the publication of such appointment if the legislation which applies to the legal entity concerned requires such
publication. Any delegation of this authorisation to another representative not indicated in the official appointment must be evidenced.

- For natural persons, where applicable, a proof of registration on a professional or trade register or any other official document showing the registration number.

- The tenderer (only the leader in case of joint tender) must provide a Financial Identification Form and supporting documents. The form is available on: http://ec.europa.eu/budget/contracts_grants/info_contracts/index_en.cfm

2. EVALUATION AND AWARD

2.1. Evaluation steps

The evaluation is based on the information provided in the submitted tender. It takes place in three steps:

1. Verification of non-exclusion of tenderers on the basis of the exclusion criteria
2. Selection of tenderers on the basis of selection criteria
3. Evaluation of tenders on the basis of the award criteria (technical and financial evaluation)

Only tenders meeting the requirements of one step will pass on to the next step.

2.2. Exclusion criteria

All tenderers shall provide a declaration on their honour (see Annex 2), duly signed and dated by an authorised representative, stating that they are not in one of the situations of exclusion listed in the Annex 2.

The declaration on honour is also required for identified subcontractors whose intended share of the contract is above 20%.

The successful tenderer shall provide the documents mentioned as supporting evidence in Annex 2 before signature of the contract and within a deadline given by the contracting authority. This requirement applies to all members of the consortium in case of joint tender. In case of doubt on this declaration on the honour, the contracting authority may also request the evidence for subcontractors whose intended share of the contract is above 20%.

2.3. Selection criteria

Tenderers must prove their economic, financial, technical and professional capacity to carry out the work subject to this call for tender.

The tenderer may 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 Contracting Authority
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.

2.3.1. Economic and financial capacity criteria and evidence

In order to prove their economic and financial capacity, the tenderer (in case of a joint tender the combined capacity of all tenderers and identified subcontractors) must comply with the following criteria:

- The tenderer must have an overall average annual turnover for the last two financial years for which the accounts have been closed of minimum 200,000 Euro.

The following evidence should be provided:

- Copy of the profit & loss account for the last two years for which accounts have been closed,
- Failing that, appropriate statements from banks,
- If applicable, evidence of professional risk indemnity insurance;

If, for some exceptional reason which the Contracting Authority considers justified, a tenderer is unable to provide one or other of the above documents, he or she may prove his or her economic and financial capacity by any other document which the Contracting Authority considers appropriate. In any case, the Contracting Authority must at least be notified of the exceptional reason and its justification in the tender. The Commission reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity.

2.3.2. Technical and professional capacity criteria and evidence

a. Criteria relating to tenderers

Tenderers (in case of a joint tender the combined capacity of all tenderers and identified subcontractors) must comply with the following criteria:

- The tenderer must prove experience in the field of e-Freight with at least one project delivered in this field in the last three years with a minimum value of €50,000.
- The tenderer must prove experience in the organisation of meetings and conferences, and in secretarial tasks (such as drafting clear and precise minutes of the meetings)
- The tenderer must prove capacity to draft reports in English and the ability to ensure communication and analysis in English, with native-level level language skills in English or equivalent.
- The tenderer must prove experience in survey techniques, data collection, statistical analyses and drafting reports and recommendations
• The tenderer must prove experience of working in a European environment and capacity to have an EU wide coverage.

b. Criteria relating to the team delivering the service:

The team delivering the service should include, as a minimum, the following profiles:

**Project Manager:** At least five years of experience in project management, including overseeing project delivery, quality control of delivered service, client orientation and conflict resolution experience in projects of a similar size (at least €100,000) and geographical coverage, with experience in management of team of at least five people.

**Language quality check:** at least one member of the team should have native-level language skills in English or equivalent, as guaranteed by a certificate or past relevant experience. All members of the team should have a good command of English in reading and writing, collectively the team should have the ability to communicate in other EU languages.

**Secretarial support:** relevant experience in the organisation of meetings and conferences, and in secretarial tasks (such as drafting clear and precise minutes of the meetings)

**Data collection:** collectively the team should have knowledge of at least three EU languages and proven experience of three years in data collection techniques (surveys, literature review and statistical analyses).

**Expert in logistics:** Relevant higher education degree and three years' professional experience in the field of logistics

**Expert in information technologies:** Relevant higher education degree and three years' professional experience in the field of information technologies.

c. Evidence:

The following evidence should be provided to fulfil the above criteria:

• List of relevant services provided in the past three years, with sums, dates and recipients, public or private. The most important services shall be accompanied by certificates of satisfactory execution, specifying that they have been carried out in a professional manner and have been fully completed;

• The educational and professional qualifications of the persons who will provide the service for this tender (CVs) including the management staff. Each CV provided should indicate the intended function in the delivery of the service.

2.4. Award criteria

The tender will be awarded according to the best-value-for-money procedure. The quality of the tender will be evaluated based on the following criteria. The maximum total quality score is 100 points.
• **Quality of the proposed methodology taking into account the variety of tasks, both technique and content related** (60 points – minimum threshold 60%)
  o Sub-criterion 1.1 (25 points – minimum threshold 50%): Overall approach
  o Sub-criterion 1.2 (20 points– minimum threshold 50%): Data collection techniques
  o Sub-criterion 1.3 (15 points– minimum threshold 50%): Coverage representative of the sector and of Europe (e.g. geographically or in terms of types of stakeholders that can be reached)

• **Organisation of the work** (25 points – minimum threshold 60%)

  This criterion will assess how the roles and responsibilities of the proposed team and of the economic operators (in case of joint tenders, including subcontractors if applicable) are distributed for each task. It also assesses the global allocation of time and resources to the project and to each task or deliverable, and whether this allocation is adequate for the work. The tender should provide details on the allocation of time and resources and the rationale behind the choice of this allocation.

• **Quality control measures** (15 points – minimum threshold 60%)

  This criterion will assess the quality control system applied to the service foreseen in this tender specification concerning the management and meeting of commitments, the quality of the deliverables, the language quality check, and continuity of the service in case of absence of the member of the team or other difficulties. The quality system should be detailed in the tender and specific to the tasks at hand; a generic quality system will result in a low score.

  Tenders must score above 50% for each sub-criterion, 60% for each criterion and above 70% in total. Tenders that do not reach the minimum quality thresholds will be rejected and will not be ranked.

  After evaluation of the quality of the tender, the tenders are ranked using the formula below to determine the tender offering best value for money. A weight of 70/30 is given to quality and price. The contract will be awarded to the tender which offers the best ratio:

  Score for tender \( x = \frac{\text{total quality score for award criteria for tender } x}{100} \times 70 + \frac{\text{cheapest price}}{\text{price of tender } x} \times 30 \)multiplied by 70

  2.5. **Technical offer**

  The technical offer must cover all aspects and tasks required in the technical specifications and provide all the information needed to apply the award criteria. Offers deviating from the requirements or not covering all requirements may be excluded on the basis of non-conformity with the tender specifications and will not be evaluated.
2.6. Financial offer

The price for the tender must be quoted in euro. Tenderers from countries outside the euro zone have to quote their prices in euro. The price quoted may not be revised in line with exchange rate movements. It is for the tenderer to assume the risks or the benefits deriving from any variation.

Prices must be quoted free of all duties, taxes and other charges, including VAT, as the European Union is exempt from such charges under Articles 3 and 4 of the Protocol on the privileges and immunities of the European Union. The amount of VAT may be shown separately.

The quoted price must be a fixed amount which includes all charges (including travel and subsistence). Travel and subsistence expenses of the contractor are not refundable separately.

The Commission will reimburse travel and subsistence costs for 20 international speakers in total over the whole duration of the contract in accordance with its Article I.1.3.

Precisions in view of the preparation of the financial offer

The number of meetings in tasks 2.1, 2.2 and 2.3 to be taken into account for the preparation of the financial offer is:

- forum meetings: 3 times per year in its plenary form and 15 times per year in the form of a sub-group
- 3 annual workshops
- 6 international cooperation meetings

Indicative price of the contract: € 450,000.
3. TECHNICAL SPECIFICATIONS

Content of the Marco Polo Work Programme 2013:

"Supporting measures for multimodal transport – to provide technical and operational support for the identification and implementation of measures that will improve the efficiency of information exchange in multimodal freight transport, in terms of information systems and their interoperability, and more widely of business relations (vertical and horizontal cooperation). This will be supported through the establishment of a discussion forum and related working groups of the relevant logistics and modal stakeholders including standardisation initiatives at European and international level."

1. Introduction

1.1. Context

The logistics and freight transport industries are amongst the most dynamic and important sectors of the European economy. Future logistics will face the need for an increased and easier access to information, to allow for example better real-time management of transport and further cooperation between all actors in the chain.

There are a number of information systems and standards already in place which provide a basis for easier information exchange:

- In all transport modes, European initiatives support electronic systems exchanging freight traffic and transport data, for transport by sea (SafeSeaNet, Directive 2010/65/EU, Blue Belt), inland waterways (RIS), rail (TAF-TSI), road (ITS), air (SESAR); urban transport; e-Customs; e-Commerce; the Digital Agenda.

- Research projects have produced results providing a basis for e-Freight, and further projects are foreseen.

- Projects provide input to the work of European and international standardisation organisations. The Commission also established contacts with standardisation organisations and initiatives in the US and Asia. Such standardisation organisations include UN, ISO, CEN, WCO, OASIS/UBL, GS1, etc.

- Industry also took up initiatives on specific subjects: FIATA and BIMCO multimodal waybills, maritime electronic bills of lading like the English Bolero, the air IATA e-Freight.

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2 Related funding schemes are the 7th Framework Programme (FP7) and Horizon 2020, the new EU Framework Programme for Research and Innovation

3 United Nations, International Organisation for Standardization, European Committee for Standardization, World Customs Organization, OASIS Universal Business Language, GS1

4 International Federation of Freight Forwarders Associations
But these systems are developed at sectorial level, in different transport modes and by various communities. Therefore, they are used only for specific purposes and on particular parts of the transport chain. The information flows remain fragmented.

To achieve EU-wide (and beyond) truly harmonised and interoperable systems requires enhanced coordination as well as political and governance support.

In that sense, the Transport White Paper 2011 announced the e-Freight policy, with the aim to smoothly connect logistics stakeholders for an efficient exchange and use of information.

In a first step, the Commission will propose in 2014 a Communication, to provide a signal, raise awareness of all relevant parties and gather them around a common vision. To make the vision become a reality, the Communication will call on all stakeholders for an active involvement and identify the necessary measures.

The e-Freight Communication will then be implemented through follow-up actions.

1.2. Objectives
Objective of e-Freight is to achieve a smooth connection of all stakeholders along the whole supply chain, for an efficient access and use of information in freight transport. This relies on three pillars:

- Moving "for real" from paper to electronic documents in order to save costs. This pillar aims at lifting remaining barriers to e-transport documents, and at enhancing digitalisation in each mode and across modes.

- Simplifying procedures and avoiding repeated data entry into different systems to decrease administrative burden. Although a significant part of the information that is exchanged along the logistics chain and with authorities is common to several documents, when changing mode or stakeholder, the same data often has to be provided again. Even when electronic documents are used, the repeated provision of the same data is often needed due to different data formats used.

In an e-Freight context, the establishment of the adequate information exchange mechanisms will allow that information has to be provided only once and that only relevant information will be made accessible to the right stakeholders.

Applications include "multimodal electronic waybills" ("single transport documents") and a "single window" for reporting to authorities.

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5 Baltic and International Maritime Council
6 Bill of Lading Electronic Registration Organisation
• Integrating information from different sources and layers across modes to build new business opportunities for the sector, serving efficiency, growth and competitiveness.

In particular, information on available transport services through multimodal journey planners for freight and visibility of goods will increase efficiency through helping decision-makers to optimise the use of existing transport infrastructure and resources. For example, cargo from various origins will be bundled into the same vehicle, and warning about delays will optimise real-time operational management.

1.3. Challenges for a concrete implementation

Concretely, a number of actions, with the involvement of all relevant stakeholders (shippers, freight forwarders, transport operators, authorities, infrastructure managers, standardisation organisations), are needed to bring the e-Freight vision to life:

• Providing the technical tools that will allow logistics actors to communicate in a "common language" to simplify access to information and decrease costs. Aim shall not be to develop new standards, but to agree across communities on a common denominator across communities’ standards.

• Providing the right conditions for companies to seize new business opportunities thanks to trusted data sharing relying on adequate data protection tools. That might for example include implementation of standards in specific fields (such as transport related to public procurement activities), making better use of infrastructure managers information, data protection tools, and deployment projects.

To that extent, several topics need to be further looked into, such as:

1) Developing specifications for a standardised "common vocabulary", in association with standardisation organisations: Work will aim at developing a dictionary of the "vocabulary" used for information exchange on logistics. Standardisation organisations, users from all modes of transport and transport-related stakeholders (e.g. customs) will be involved. Standards update mechanisms for the future also need to be addressed.

2) Developing specifications for standardised "messages", in association with standardisation organisations. Work will aim at adopting / developing one or a limited number of standard syntaxes for the most common messages in freight transport logistics, including:

• a message describing available transport services,

• a "single transport document" message usable for any mode of transport individually and for multimodal transport,

• a "single reporting document" for reporting to all transport and trade authorities in Europe. It will build on developments under Directive 2010/65/EU, Blue Belt and eMaritime, and complement these developments with reporting requirements in the other modes of transport.
• a message on the location and status of cargo. Data in the message will rely on technologies from network management systems or from tracking devices based on RFID\(^7\) or Galileo.

• a "dangerous goods document" message

These messages will aim at being applicable to any mode of transport. The Commission will pay a particular attention to the links between the messages and the possibility for stakeholders to reuse information contained in one of the messages for feeding into another message, for example from transport documents to reporting formalities. Future update mechanisms for standards will also be addressed.

3) Supporting the implementation of standards by a large community of stakeholders in the sector. Objective will be to address best practices in implementation. Wide implementation of the common language will indeed need adaptation to concrete organisations and business processes, as well as address business models for benefit sharing, based on first developments by the industry\(^8\), and data ownership questions.

4) Implementing the use of the standardised transport documents for freight transport occurring in the frame of public procurement. Such implementation will require:

• a data mapping of transport messages against public procurement messages

• exchanges on business processes to be taken into account

• exchanges on any additional challenge to consider in order to envisage a concrete implementation.

5) Data protection and security

Companies need sensitive data (commercial / safety / security) to be protected. Therefore, trust will only be possible if any risk in terms of data protection is removed. Extensive legislation is already being implemented for e-identification\(^9\) and data protection\(^10\). In addition, the Commission proposed in 2013 a new initiative on cybersecurity that complements existing measures\(^11\). However, specific measures are needed for secure logistics information exchange given the sensitiveness of freight transport as a trade enabler.

A twofold governance system is envisaged. On the one hand, to allow stakeholders to define what information they want to be accessible by whom, on a need-to-know basis: thanks to access rights defined in new IT tools. On the other hand, to allow stakeholders to

\(^7\) Radio-frequency identification

\(^8\) For instance, first developments have been made in the project CO3: [http://www.co3-project.eu/](http://www.co3-project.eu/)

\(^9\) Action Plan 2008/798

\(^10\) Directive 95/46/EC and Communication 2012/9

\(^11\) JOIN(2013)1 and COM(2013)48
be certain about the identity of their interlocutor. In addition, trusted and efficient systems listing vehicle IDs associated with each user could serve dangerous goods management.12

There is a need to:

- support the industry in developing tools that allow for specific access rights
- assess if existing bodies could be in charge of data protection governance or if new governance bodies should be created. Tasks of governance bodies will for instance include delivering authentication certificates and setting-up registries. In addition to listing users, access rights, their category (shipper, operator, etc.), indication on good repute, registries would need to list vehicle IDs associated with each user for dangerous goods management.

6) Identifying unexploited data that could be used for developing new business opportunities in the logistics sector – especially information collected by infrastructure managers that could be better used in a wider logistics chain context. If numerous actors are already convinced about new business opportunities offered by unexploited data, others still need potential to be further highlighted. Success stories cases exist already, but additional ones are needed to show examples and benefits of data sharing use cases, like horizontal collaboration or increased goods visibility.

7) Infrastructure for information exchange: For e-Freight solutions to be reliable, the infrastructure supporting the exchange of data also needs to be optimised. Today, several infrastructures for data exchange and sharing are being developed, like SafeSeaNet13, maritime Single Windows, e-Customs14, TAF15. These need to be enhanced to provide for a seamless infrastructure usable by several modes and for several purposes, reducing the need for players to forward data from an infrastructure to another. Therefore, existing data exchange infrastructures may need to be interlinked / enlarged / optimised, and potentially new infrastructures to be developed. This will allow players to provide information only once. Data will then be accessible to the right stakeholders along the trip. Such infrastructures could rely on "data pipelines" or cloud computing (e.g. "access points" as developed in the e-Freight research project16).

12 This would answer to the needs expressed by the UN working group on dangerous goods: http://www.unece.org/fileadmin/DAM/trans/doc/2013/dgwp15ac1/ECE-TRANS-WP15-AC1-2013-GE-INF.3e.pdf
15 Telematic Applications for Freight
16 http://www.efreightproject.eu/
2. Purpose of the contract: supporting e-Freight implementation

The purpose of the contract is to provide operational support and reports as regards the organisation of the e-Freight forum, workshops, international cooperation, and dissemination activities.

2.1. Task 1: Organisation of an e-Freight forum

The contractor will support the organisation of an e-Freight forum. The forum is expected to gather about 100 participants in order to discuss the e-Freight vision, and to address key questions for implementation such as the ones identified under 1.3.

The forum will meet in the form of a plenary, and may also meet in the form of up to 5 sub-groups composed of around 30 persons addressing specific topics.

Participants to the forum will be identified by the Commission.

The contractor will be responsible for the following sub-tasks in support of the forum organisation, both in its plenary and sub-group forms:

Technical support to discussions

It may include literature review and surveys in order to produce the following:

- extended information on potential costs and benefits of e-Freight services
- tables summarising data elements and messages contents / structures in various existing standards in order to allow for a comparison between them
- statistics on the use of each type of standard (e.g. UN, GS1, OASIS/UBL, etc) by companies and authorities, per type of stakeholder. Such statistics could rely on desk research as well as on a specific survey
- reports summarising best practices on e-Freight implementation in the daily business that will be made public for a wide use by stakeholders (based on input from seminars and on literature review)
- proposals for business models for distributing gains from data sharing and addressing data ownership in order to ensure that each actor is rewarded for his efforts to collect data and for increased collaboration with others
- identification of untapped information that could be used for developing new capacities in the logistics sector (for example for horizontal collaboration or increased goods visibility)

Organisation and preparation of meetings

The forum and potential sub-groups will meet in average once a month, in Brussels (in the premises of the Commission), with a total of up to 15 meetings per year. The contractor will be present at the meetings and will be responsible for their logistic organisation. This includes:
• preparing invitations for participants at the latest 6 weeks before the meeting, and follow-up

• sending to participants an agenda and supporting documents once validated by the Commission at the latest 1 week before the meeting. In addition, use of an IT platform for sharing documents can be envisaged.

• during the meeting, secretarial support: taking care of the registration of participants and providing the participants with a welcome package including agenda and supporting documents for the meeting

Terms of reference
The contractor, in close cooperation with the Commission and with the participants to the forum, will prepare a first draft of terms of reference describing the objectives and procedures of the forum, and, if appropriate, of sub-groups.

Minutes of meetings
The contractor will produce detailed minutes at the latest 1 week after each meeting. Minutes will include:

• a summary of presentations done

• detailed reporting of debates following presentations, specifying the identity of the participants making the statements

• an executive summary

• a list of participants

• an (electronic) copy of the presentations that were used

• provisional dates for the next meetings

The contractor will be in charge of circulating minutes for comments first to the Commission, and then across participants (upon Commission's approval), and for producing a final version of the minutes. In addition, use of an IT platform for sharing minutes can be envisaged.

Draft conclusions
In addition to the final report, the contractor will prepare bi-annual reports summarizing the input from the forum. He will submit this draft to the Commission and integrate the comments provided by the Commission and by the participants to the forum.

Precisions on travel costs
The Commission will take care of the reimbursement of the travel costs for the participants to the forum.

The contractor will take care of the reimbursement of its own travel costs.
2.2. Task 2: Organisation of up to three annual workshops on e-Freight

In addition, the contractor will be responsible for the organisation of up to three annual workshops (one each year) on e-Freight for dissemination purposes. The workshops will take place in Brussels.

The workshop will aim at reporting on outcomes of the forum, on latest developments on e-Freight by the industry, as well as on R&D achievements. It will aim at gathering around 200 public and private stakeholders from all modes of transport, from shippers to transport operators and freight forwarders, through network managers and transport / trade authorities.

The contractor will be responsible for the following sub-tasks:

Proposing a plan for the organisation of the workshop (one plan per workshop)

The contractor will propose to the Commission at the latest 2 months after the entry into force of the contract, and then every 12 months a plan for the organisation of the workshop that will include (as further detailed under the other sub-tasks):

- a proposal for a list of relevant stakeholders (speakers and participants)
- a proposal for the logistic organisation of the workshop

He will update it in accordance with the Commission's comments.

Identification of relevant stakeholders

The contractor will be responsible for proposing to the Commission a list of relevant contacts who could be invited to participate. This identification process should ensure:

- geographical distribution across Europe, in order to ensure representativeness of the EU as a whole,
- involvement of both public and private stakeholders,
- all modes of transport shall be represented.

Speakers and participants

The workshop is expected to gather around 200 stakeholders. A list of potential speakers and a mailing list with potential participants will be drawn by the contractor, in close relation with the Commission.

Once stakeholders lists will have been discussed and approved by the Commission, the contractor will be responsible for contacting the stakeholders to invite them to participate. In case of refusal by a stakeholder (for speakers), the contractor will, in relation with the Commission, look for an appropriate replacement.
Organisation of the workshop

The workshop is expected to take place once a year. The contractor will be responsible for the organisation of the workshops. This includes:

- drafting the agenda and supporting documents in co-operation with the Commission (subject to approval by the Commission)
- setting up a website. Registrations of each session of the workshop (webstreaming) as well as presentations that were used will be made available at the latest 1 month after the workshop on the website
- pre-selection of venues, booking meeting rooms as appropriate, catering and follow-up
- visual communication support
- sending invitations to potential speakers at the latest 4 months before the workshop and follow-up
- sending invitations to potential participants at the latest 3 months before the workshop
- sending reminders to potential participants 2 months, 1 months, 3 weeks, 2 weeks, and 1 week before the workshop
- sending to speakers an agenda and supporting documents once validated by the Commission at the latest 1 month before the workshop
- sending to participants an agenda once validated by the Commission at the latest 1 month before the workshop
- sending to the Commission the list of participants who have confirmed their presence 2 months, 1 months, 3 weeks, 2 weeks, and 1 week before the meeting
- during the meeting, taking care of the registration of participants and providing the participants with a welcome package including agenda and supporting documents for the meeting
- operational support during the workshop

No fee for participation will be asked to the participants.

Minutes of the workshop

The contractor will produce minutes at the latest 3 weeks after each workshop. Minutes will include:

- a summary of presentations done
- detailed reporting of debates following presentations, specifying the identity of the participants making the statements
• an executive summary
• a list of participants
• an (electronic) copy of the presentations that were used

The contractor will be in charge of circulating minutes for comments to the Commission and for producing a final version of the minutes.

**Precisions on travel costs**

The contractor will take care of the reimbursement of its own travel costs.
2.3. Task 3: International cooperation

The Commission is in discussions with other global regions on the e-Freight subject. Organisations involved include the US EFM (Electronic Freight Management), the APEC (Asia-Pacific Economic Cooperation) 'supply chain visibility' and the Chinese, Japanese and Korean Neal-Net initiative: [http://www.nealnet.org/](http://www.nealnet.org/)

In order to support the Commission in further international cooperation, the contractor will be responsible for the following sub-tasks.

**Logistic organisation of meetings**

2 meetings per year will be organised. The contractor will be responsible for the logistic organisation of the meetings. This includes:

- preparing and sending invitations to participants at the latest 1 month before the meeting
- sending to participants an agenda and supporting documents once validated by the Commission at the latest 1 week before the meeting. In addition, use of an IT platform for sharing documents can be envisaged.
- sending to the Commission the list of participants who have confirmed their presence 1 week at the latest before the meeting
- welcoming participants with relevant paper documents, and collecting their signatures

**Minutes of meetings**

The contractor will produce detailed minutes at the latest 2 weeks after each meeting. Minutes will include:

- a summary of presentations done
- detailed reporting of debates following presentations, specifying the identity of the participants making the statements
- an executive summary
- a list of participants
- a copy of the presentations that were used
- provisional dates for the next meetings

The contractor will be in charge of circulating minutes for comments first to the Commission, and then across participants (upon Commission's approval), and for producing a final version of the minutes. In addition, use of an IT platform for sharing minutes can be envisaged.
Technical support to discussions

That may include:

- the drafting of tables summarising data elements and messages contents / structures in various standards
- comparison of business process models

2.4. Task 4: Dissemination measures

In order to reach a critical mass for implementation of e-Freight services, information of all stakeholders about e-Freight success stories are key. To highlight potential of further data sharing and spread the word about e-Freight, the contractor will assist the Commission in dissemination measures.

That will include proposing dissemination measures (such as leaflets or videos), and taking care of their conceptual preparation (content and layout of up to 3 leaflets, content and structure of a video) once approved by the Commission.
3. Reports and meetings

A kick-off meeting will take place in Brussels, at the latest 15 working days following the date of entry into force of the contract. Preparatory documents for the kick-off meeting, including a draft meeting agenda, are to be delivered to the Commission’s services five working days before the kick-off meeting. These preparatory documents shall also include a description of the methodology including resources and timetable of the work to be carried out.

The kick-off meeting report will contain the minutes of discussions and agreements reached in the kick-off meeting. It will be accompanied by the updated preparatory documents mentioned above in accordance with the indications provided by the Commission during the kick-off meeting. The inception report shall be made available to the Commission's services one week after the kick-off meeting.

Annual progress reports will be submitted to the Commission. They will describe work carried out during the year. Two annual progress reports are planned:

- a first report to be submitted 12 months after the date of entry into force of the contract
- a second report to be submitted 24 months after the date of entry into force of the contract

These progress reports are linked to the interim payments referred to in Article I.4.1 of the contract. All progress reports shall contain an executive summary.

Each of these reports will be presented to the Commission during annual progress meetings, before the submission of the related invoice. Supporting documents and draft progress report for the progress meetings according to the meeting agenda shall be prepared in cooperation with the Commission services. They shall be made available to the Commission’s services one week before the meeting. The meeting reports will contain the minutes of discussions and agreements reached in the meeting. They shall be made available to the Commission's services one week after the meeting. The progress reports, updated in accordance with the indications provided by the Commission during the meeting shall be made available to the Commission’s services one week after the meeting.

The contractor will submit a draft final report to the Commission at the latest 33 months after the date of entry into force of the contract. The draft final report shall summarize the input from the forum, workshops, international cooperation and dissemination activities, and include the following sections:

- Separate executive summary (as further detailed under chapter 4)
- Main report
- Annexes containing any factual or technical material or any detailed analysis

Within sixty days after the submission of this draft final report the Commission will provide the contractor with its comments on the final report and if necessary the date of a final progress meeting in Brussels will be agreed in order to discuss the Commission’s observations. The meeting report shall be made available to the Commission's services one
week after the meeting. It will contain the minutes of discussions and agreements reached in the meeting.

After this meeting, the Contractor shall have 20 days in which to submit the final report.

For all the tasks, the contractor will be asked to regularly present progress and results of the forum during meetings with an e-Freight steering committee made up of representatives from various DGs of the Commission.

**Report format and publication**

All reports shall be drafted in English and proof-read by a native or native-equivalent speaker. Attention shall be brought to the clarity of the documents.

The reports shall be supplied in electronic form in MS Word.

The Commission may publish the results of the final report. For this purpose, the tenderer must ensure that the report is not subject to any restrictions deriving from intellectual property rights of third parties. Should he intend to use data in the report, which cannot be published, this must be explicitly mentioned in the offer.

Any results or rights, including copyright and other intellectual or industrial property rights, obtained in performance of the contract, shall be owned solely by the Union.

The duration of the tasks shall not exceed 36 months. This period is calculated in calendar days.

Execution of the tasks begins after the date on which the contract enters into force.

In principle, the deadlines set out below cannot be extended. The Contractor is deemed solely responsible for delays occasioned by subcontractors or other third parties (except for rare cases of force majeure). Adequate resources and appropriate organisation of the work including management of potential delays should be put in place in order to observe the timetable below.

4. **CONTENT, STRUCTURE AND GRAPHIC REQUIREMENTS OF THE FINAL DELIVERABLES**

The final report shall conform to the corporate visual identity of the European Commission by applying the graphic rules set out in the European Commission’s Visual Identity Manual, including its logo.

The Commission is committed to making online information as accessible as possible to the largest possible number of users including those with visual, auditory, cognitive or

17 The Visual Identity Manual of the European Commission is available upon request. Requests should be made to the following e-mail address: comm-visual-identity@ec.europa.eu
physical disabilities, and those not having the latest technologies. The Commission supports the Web Content Accessibility Guidelines 2.0 of the W3C.

For full details on Commission policy on accessibility for information providers, see: http://ec.europa.eu/ipg/standards/accessibility/index_en.htm

Pdf versions of studies and reports destined for online publication should respect W3C guidelines for accessible pdf documents. See: http://www.w3.org/WAI/

4.1. Content

4.1.1. Final report

The final report shall include:

- an abstract of no more than 200 words and an executive summary of maximum 6 pages, both in English and French; it should contain a description of the most important findings, in easy-to-understand terms

- the following standard disclaimer:

  “The information and views set out in this [report/study/article/publication...] are those of the author(s) and do not necessarily reflect the official opinion of the Commission. The Commission does not guarantee the accuracy of the data included in this report/study. Neither the Commission nor any person acting on the Commission’s behalf may be held responsible for the use which may be made of the information contained therein.”

- specific identifiers which shall be incorporated on the cover page provided by the Contracting Authority.

4.1.2. Publishable executive summary

The publishable executive summary shall be provided in both in English and French and shall include:

- the following standard disclaimer:

  “The information and views set out in this [report/study/article/publication...] are those of the author(s) and do not necessarily reflect the official opinion of the Commission. The Commission does not guarantee the accuracy of the data included in this [report/study/article/publication...]. Neither the Commission nor any person acting on the Commission’s behalf may be held responsible for the use which may be made of the information contained therein.”

- specific identifiers which shall be incorporated on the cover page provided by the Contracting Authority.

4.2. Graphic requirements

For graphic requirements please refer to the template provided in the annex 4. The cover page shall be filled in by the contractor in accordance with the instructions provided in the template. For further details you may also contact comm-visual-identity@ec.europa.eu.
5. ANNEXES

1. Tenderer’s Identification Form
2. Declaration related to the exclusion criteria and absence of conflict of interest
3. Power of Attorney (mandate in case of joint tender)
4. Standard Word template for studies
5. Draft Contract
ANNEX 1

IDENTIFICATION OF THE TENDERER
(Each service provider, including any member of a consortium or grouping and subcontractor(s) whose share of the work is more than 20% of the contract must complete and sign this identification form)

Call for tender MOVE/D1/2013-885

<table>
<thead>
<tr>
<th>Identity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of the tenderer</td>
</tr>
<tr>
<td>Legal status of the tenderer</td>
</tr>
<tr>
<td>Date of registration</td>
</tr>
<tr>
<td>Country of registration</td>
</tr>
<tr>
<td>Registration number</td>
</tr>
<tr>
<td>VAT number</td>
</tr>
<tr>
<td>Description of statutory social security cover (at the level of the Member State of origin) and non-statutory cover (supplementary professional indemnity insurance)(^{18})</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address of registered office of tenderer</td>
</tr>
<tr>
<td>Where appropriate, administrative address of tenderer for the purposes of this invitation to tender</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contact Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surname:</td>
</tr>
<tr>
<td>First name:</td>
</tr>
<tr>
<td>Title (e.g. Dr, Mr, Ms):</td>
</tr>
</tbody>
</table>

\(^{18}\) For natural persons
<table>
<thead>
<tr>
<th>Position (e.g. manager):</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone number:</td>
<td></td>
</tr>
<tr>
<td>Fax number:</td>
<td></td>
</tr>
<tr>
<td>E-mail address:</td>
<td></td>
</tr>
</tbody>
</table>

### Legal Representatives

**Names and function of legal representatives** and of other representatives of the tenderer who are authorised to sign contracts with third parties

### Declaration by an authorised representative of the organisation\(^{19}\)

I, the undersigned, certify that the information given in this tender is correct and that the tender is valid.

<table>
<thead>
<tr>
<th>Surname:</th>
<th>Signature:</th>
</tr>
</thead>
<tbody>
<tr>
<td>First name:</td>
<td></td>
</tr>
</tbody>
</table>

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\(^{19}\) This person must be included in the list of legal representatives; otherwise the signature on the tender will be invalidated.
ANNEX 2

Declaration of honour on exclusion criteria and absence of conflict of interest

(The undersigned (insert name of the signatory of this form):

☐ in [his][her] own name (for a natural person)

or

☐ representing the following legal person: (only if the economic operator is a legal person)

full official name:

official legal form:

full official address:

VAT registration number:

➢ declares that [the above-mentioned legal person][he][she] is not in one of the following situations:

a) is bankrupt or being wound up, is having its affairs administered by the courts, has suspended business activities, is the subject of proceedings concerning those matters, or is in any analogous situation arising from a similar procedure provided for in national legislation or regulations;

b) has been convicted of an offence concerning professional conduct by a judgment of a competent authority of a Member State which has the force of res judicata;

c) has been guilty of grave professional misconduct proven by any means which the contracting authorities can justify including by decisions of the European Investment Bank and international organisations;

d) is not in compliance with all its obligations relating to the payment of social security contributions and the payment of taxes in accordance with the legal provisions of the country in which it is established, with those of the country of the contracting authority and those of the country where the contract is to be performed;

e) has been the subject of a judgement which has the force of res judicata for fraud, corruption, involvement in a criminal organisation, money laundering or any other illegal activity, where such activity is detrimental to the Union's financial interests;

f) is a subject of an administrative penalty for being guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in a procurement procedure or failing to supply this information, or having been declared to be in serious breach of its obligations under contracts covered by the Union's budget.

➢ (Only for legal persons other than Member States and local authorities, otherwise delete) declares that the natural persons with power of representation, decision-
making or control\textsuperscript{20} over the above-mentioned legal entity are not in the situations referred to in b) and e) above;

- declares that [the above-mentioned legal person][he][she]:

  g) has no conflict of interest in connection with the contract; a conflict of interest could arise in particular as a result of economic interests, political or national affinity, family, emotional life or any other shared interest;

  h) will inform the contracting authority, without delay, of any situation considered a conflict of interest or which could give rise to a conflict of interest;

  i) has not granted and will not grant, has not sought and will not seek, has not attempted and will not attempt to obtain, and has not accepted and will not accept any advantage, financial or in kind, to or from any party whatsoever, where such advantage constitutes an illegal practice or involves corruption, either directly or indirectly, inasmuch as it is an incentive or reward relating to award of the contract;

  j) provided accurate, sincere and complete information to the contracting authority within the context of this procurement procedure;

- acknowledges that [the above-mentioned legal person][he][she] may be subject to administrative and financial penalties\textsuperscript{21} if any of the declarations or information provided prove to be false.

In case of award of contract, the following evidence shall be provided upon request and within the time limit set by the contracting authority:

For situations described in (a), (b) and (e), production of a recent extract from the judicial record is required or, failing that, a recent equivalent document issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied. Where the tenderer is a legal person and the national legislation of the country in which the tenderer is established does not allow the provision of such documents for legal persons, the documents should be provided for natural persons, such as the company directors or any person with powers of representation, decision making or control in relation to the tenderer.

For the situation described in point (d) above, recent certificates or letters issued by the competent authorities of the State concerned are required. These documents must provide evidence covering all taxes and social security contributions for which the tenderer is liable, including for example, VAT, income tax (natural persons only), company tax (legal persons only) and social security contributions.

For any of the situations (a), (b), (d) or (e), where any document described in two paragraphs above is not issued in the country concerned, it may be replaced by a sworn or, failing that, a solemn statement made by the interested party before a judicial or administrative authority, a notary or a qualified professional body in his country of origin or provenance.

If the tenderer is a legal person, information on the natural persons with power of representation, decision making or control over the legal person shall be provided only upon request by the contracting authority.

\textsuperscript{20} This covers the company directors, members of the management or supervisory bodies, and cases where one natural person holds a majority of shares.

\textsuperscript{21} As provided for in Article 109 of the Financial Regulation (EU, Euratom) 966/2012 and Article 145 of the Rules of Application of the Financial Regulation
<table>
<thead>
<tr>
<th>Full name</th>
<th>Date</th>
<th>Signature</th>
</tr>
</thead>
</table>

ANNEX 3

POWER OF ATTORNEY

mandating one of the partners in a joint tender as lead partner and lead contractor

The undersigned:

– Signatory (Name, Function, Company, Registered address, VAT Number)

having the legal capacity required to act on behalf of his/her company,

HEREBY AGREES TO THE FOLLOWING:

1) To submit a tender as a partner in the group of partners constituted by Company 1, Company 2, Company N, and led by Company X, in accordance with the conditions specified in the tender specifications and the terms specified in the tender to which this power of attorney is attached.

2) If the European Commission awards the Contract to the group of partners constituted by Company 1, Company 2, Company N, and led by Company X on the basis of the joint tender to which this power of attorney is attached, all the partners shall be co-signatories of the Contract in accordance with the following conditions:

(a) All partners shall be jointly and severally liable towards the European Commission for the performance of the Contract.

(b) All partners shall comply with the terms and conditions of the Contract and ensure the proper delivery of their respective share of the services and/or supplies subject to the Contract.

1) Payments by the European Commission related to the services and/or supplies subject to the Contract shall be made through the lead partner’s bank account: [Provide details on bank, address, account number].

2) The partners grant to the lead partner all the necessary powers to act on their behalf in the submission of the tender and conclusion of the Contract, including:

(a) The lead partner shall submit the tender on behalf of the group of partners.

(b) The lead partner shall sign any contractual documents — including the Contract, and Amendments thereto — and issue any invoices related to the Services on behalf of the group of partners.

(c) The lead partner shall act as a single contact point with the European Commission in the delivery of the services and/or supplies subject to the Contract. It shall co-ordinate the delivery of the services and/or supplies by the group of partners to the European Commission, and shall see to a proper administration of the Contract.

Any modification to the present power of attorney shall be subject to the European Commission’s express approval. This power of attorney shall expire when all the contractual obligations of the group of partners towards the European Commission for the delivery of the services and/or supplies subject to the Contract have ceased to exist. The parties cannot terminate it before that date without the Commission’s consent.

Signed in …………………………. on [dd/mm/yyyy]

Place and date:

22 To be filled in and signed by each of the partners in a joint tender, except the lead partner;
ANNEX 4
Standard Word template for studies

<Template can be found in the Library or the Models section.>