

ΚΕΙΡΟΣΥΓΓΡΑΦΗ	Δ/ΝΤΗΣ ΤΜΗΜΑΤΟΣ	Υ/ΔΝΤΗΣ Δ/ΝΣΕΩΣ	Δ/ΝΤΗΣ Δ/ΝΣΕΩΣ	ΑΔΑΡΑΦΟΡΤΗΣ ΓΕΝ. Δ/ΝΤΗΣ	ΓΕΝ. Δ/ΝΤΗΣ

**ΑΔΙΑΒΑΘΜΗΤΟ
ΕΠΕΙΓΟΝ**

ΕΛΛΗΝΙΚΗ ΔΗΜΟΚΡΑΤΙΑ
Μόνιμη Αντιπροσωπεία της Ελλάδος
στο NATO

Αρμόδιος: Πλοίαρχος (Ο)
Νεκτάριος Γκινάκης Π.Ν.
Τηλ.: 00322-7076710

Βρυξέλλες, 21 Φεβρουαρίου 2018

Α.Π.: 926

ΠΡΟΣ: - ΥΠΕΘΑ/ΓΔΑΕΕ/ΔΑΕΤΕ
- ΥΠΕΘΑ/ΓΔΑΕΕ/ΔΑΠΚΣ

ΚΟΙΝ.: - ΓΕΕΘΑ/Γ2,Γ3 Δ/σεις (μ. ΓΕΕΘΑ/ΚΕΠΙΚ)
- ΥΠΕΞ/Διπλωματικό Γραφείο κ. Υπουργού
- ΥΠΕΞ/Δ2 Διεύθυνση
- Υπουργείο Οικονομίας και Ανάπτυξης
- Γενική Διεύθυνση Δημοσίων Συμβάσεων
και Προμηθειών (μ. ΥΠΕΞ)
Fax No.: 210 - 38 46 036
- Τεχνικό Επιμελητήριο Ελλάδας / Γραφείο
Επαγγελματικών Θεμάτων

556
27/2/18

Ε.Δ.: - ΣΑ/ΣΕΒΑΣ (μ. ΗΜΩΝ)

ΘΕΜΑ: Αναγγελία Πρόθεσης Πρόσκλησης σε Διεθνή Διαγωνιστική Διαδικασία
ΣΧΕΤ.: Reference Number: CSO(FIN)2018-004 από 19-02-2018 περί Science and Technology Organization, Collaboration Support Office (STO - CSO) Notification of Intent - NOI

Διαβιβάζεται συνημμένως αναγγελία πρόθεσης πρόσκλησης συμμετοχής σε διεθνή διαγωνιστική διαδικασία από αρμόδια Διεύθυνση Προμηθειών και Συμβάσεων του Οργανισμού Επιστήμης και Τεχνολογίας (STO - Collaboration Support Office), που αφορά σε υποστήριξη παροχής εκδοτικών υπηρεσιών για επιστημονικές δημοσιεύσεις (editorial services for the scientific publications), παρούσας Νατοϊκής Οντότητας.

Διαγωνιστική διαδικασία περιλαμβάνει δύο (2) ξεχωριστά Μέρη, ήτοι παροχή εκδοτικών υπηρεσιών για αδιαβάθμητες επιστημονικές αναφορές (unclassified scientific reports - Part I) και παροχή εκδοτικών υπηρεσιών για διαβαθμισμένες επιστημονικές αναφορές (classified scientific reports - Part II). Ενδιαφερόμενες για διαγωνιστική διαδικασία εταιρείες, δύναται όπως συμμετάσχουν υποβάλλοντας μερική προσφορά ή / και συνολική προσφορά, σύμφωνα με παρ. δύο (2) ομοίου στο παρόν εγγράφου.

Αναλυτικότερα στοιχεία αναφορικά με είδος επικείμενης Συμβάσεως, ημερομηνίες διαγωνιστικής διαδικασίας, στοιχεία συνδέσμου επιτελούς στο STO - CSO Purchasing and Contracting Branch, καθώς και λεπτομέρειες άντλησης περισσότερων πληροφοριών μέσω επίσημου ιστοσελίδας, παρέχονται στις παρ. τρία (3)-έως-έξι-(6) Κυρίου-Σώματος (ΚΣ), καθώς και στα Προσαρτήματα 1 και 2 (Τεχνικές Απαιτήσεις για Μέρη-I και II), συνημμένου στο παρόν εγγράφου.

Παρακαλούμε για τις ενέργειές σας, λαμβάνοντας υπόψη ότι προθεσμία υποβολής ενδιαφέροντος συμμετοχής από υποψήφιες εταιρείες - μέσω Μόνιμων Αντιπροσωπειών - λήγει την **Τετάρτη 28 Μαρτίου 2018**.

Σύν. Συνημ. Σελ.:
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ΑΓΓΕΛΕΤΟΣ

ΓΔΑΕΕ/ΓΡΑΜΜΑΤΕΙΑ	
Χρονολογία Εισόδου	26 ΦΕΒ. 2018
Αριθ. Πρωτ.	12332
Αριθ. Συνημμένων	-130-
Αριθ. Φακ. Θέματος	
Προς Ενέργεια	ΔΑΕΤΕ/ΔΑΠΚΣ
ΝΑ ΚΑΤΑΣΤΡΑΦΕΙ ΤΗΝ	

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SCIENCE AND TECHNOLOGY ORGANIZATION
COLLABORATION SUPPORT OFFICE

BP 25 - F-92201 Neuilly-sur-Seine Cedex - France
Tel: +33 (0)1 55 61 22 00 - Fax: +33 (0)1 55 61 22 99
E-Mail : mailbox@cs0.nato.int



19 February 2018

CSO(FIN)2018-004

**PERMANENT REPRESENTATIVES TO NATO
(Attn. Administrative Officers)**

**NOTICE OF INTENTION (NOI) TO ISSUE AN INVITATION FOR INTERNATIONAL
BIDDING (IFIB)**

1. The Collaboration Support Office (CSO) is looking for a company able to provide "Editorial Services" for the scientific publications of the NATO Science & Technology Organization. A summary of the technical specifications are enclosed in Annex 1 and 2.
2. The bid will be in two parts :
 - Part - 1 : Editorial services for unclassified Scientific Reports
 - Part - 2 : Editorial services for classified Scientific Reports

Companies are invited to bid either on one of the two parts or on both parts of the IFIB.

In addition, companies have the option to include an offer in their bid for the translation (English – French) of the executive summaries for the Scientific Reports.

3. A Bidders' Conference for potential bidders will be organized in the CSO for demonstration purposes and to address any questions in appropriate format. The date will be communicated to potential bidders in the IFIB documents. If need be, companies can attend via WebEx/Skype.
4. If your Nation is aware of companies qualified for this work, please inform CSO of the company's name, address, telephone number, fax number and the email address of the company's point of contact.

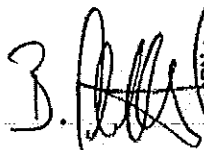
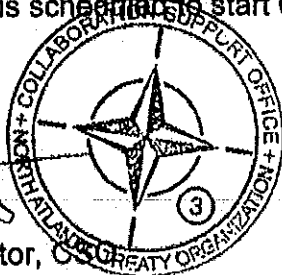
NATO UNCLASSIFIED

NATO UNCLASSIFIED

5. Nominations including the requested information should be provided by 28 March 2018 and be addressed to:

CSO
Purchasing & Contracting Officer
BP-25
F-92 201 Neuilly sur Seine
Tel: +33 1 55 22 34
Fax: +33 1 55 61 96 06
E-mail: finance@cs0.nato.int

6. The International Call for Bids will be sent to all nominated companies within two weeks of the date mentioned above, allowing a bidding period not less than 42 days.
7. The contract is scheduled to start 01 August 2018.

3.  

For the Director,
Björn SCHÖTTLER
CSO, Head of Finance

Annexes:

1. Technical specifications – Editorial services for unclassified Scientific Reports
2. Technical specifications – Editorial services for classified Scientific Reports

Copy to: FC STO, CSO BUDFIN, CSO IMSB
Action Officer: CSO P&C

NATO UNCLASSIFIED

ANNEX 1

- TECHNICAL SPECIFICATIONS -

TO

CONTRACT

***EDITORIAL SERVICES FOR
UNCLASSIFIED SCIENTIFIC
REPORTS***

1. SCOPE

The scope of this Contract is to provide Editorial Services and Electronic Publishing of the NATO Science and Technology Organisation's (STO) Scientific Technical Reports bearing a security classification up to and including NATO UNCLASSIFIED¹.

The publications to process, known generically as Technical Reports (TR), are the result of scientific studies carried out on behalf of the STO. These study groups are typically known as Task Groups (TG).

TRs range from around 50 to 1000 pages, the average size being 200 pages. The material includes a large number of embedded graphics and scientific equations. They are submitted to the Contractor as they are delivered to the CSO. On average, around fifty (50) TRs are processed and published per year. It must be understood that these figures represent the average amount of work that will be provided to the Contractor in any given year. Whilst the CSO will provide reports to the Contractor as and when they are received from the authoring community, a fixed number of reports per month cannot be guaranteed. Consequently, it is understood that there may be some peaks and troughs in the flow of work provided to the Contractor.

The primary source format of TRs submitted to the Contractor will be Microsoft Word, however, a small number of reports submitted in Latex may also be submitted.

The source language for all TRs will be English, however, in the majority of cases the text will have been written by non-native English speakers.

Following the editorial process for each TR, the following two products are to be delivered to the CSO:

- Formatted PDF²
- E-Book³

2. TR COMPONENTS AND RESPONSIBILITIES

A TR is made up of the following components:

- Front Cover
- Copyright Page
- Table of Contents

¹ NATO Information embraces all information, classified and unclassified, circulated within NATO, whether such information originates in NATO civil or military bodies or is received from member nations or from non-NATO sources. NATO UNCLASSIFIED (NU) information is information which does not carry a security classification but will be marked NATO UNCLASSIFIED. NATO UNCLASSIFIED information shall only be used for official purposes and only individuals, bodies or organisations that require it for official NATO purposes may have access to it.

² PDF optimized for internet publishing and download

³ See Paragraph 4.3.1

- Executive Summary and Synthèse⁴
- Panel Page (list of TR Contributors)
- Report Body
- Report Annexes (Supplementary Supporting Documents)
- Report Documentation Page (Meta Data)

The following table details the responsibilities for the production and editing of the above components.

Component	Responsibility for PDF	Responsibility for EBook
Front Cover	CSO to provide formatted PDF. Contractor to include in final report.	CSO to provide MS Word version. Contractor to include in final report.
Copyright Page	CSO to provide formatted PDF. Contractor to include in final report.	CSO to provide MS Word version. Contractor to include in final report.
Table of Contents	Contractor to create	Contractor to create
Executive Summary	CSO to provide in MS Word. Contractor to include only if received before the end of Step 2 (below)	CSO to provide in MS Word. Contractor to include only if received before the end of Step 2 (below)
French Translated Executive Summary (Synthèse)	Option 1: CSO to provide in MS Word (French version). Contractor to include in final report .	Option 1: CSO to provide in MS Word (French version). Contractor to include in final report
	Option 2: CSO to provide in MS Word (English version). Contractor to translate ⁵ into French and include in final report	Option 2: CSO to provide in MS Word (English version). Contractor to translate into French and include in final report

⁴ An option in the Contract is for the translation of the Executive Summary from English to French – see para 9

⁵ An option in the Contract is for the translation of the Executive Summary from English to French – see para 9

Panel Page	CSO to provide formatted PDF. Contractor to include in final report.	CSO to provide MS Word version. Contractor to include in final report.
Report Body	Contractor to create based on Report Body	Contractor to create based on Report Body
Report Annexes (Supplementary Supporting Documents)	Contractor to compile from supplied source report. Minimal editorial effort required – see para 4.3.1.	Contractor to compile from supplied source report. Minimal editorial effort required – see para 4.3.1.
Report Documentation Page	CSO to provide formatted PDF. Contractor to include in final report.	CSO to provide MS Word version. Contractor to include in final report.

3. CONTRACT REQUIREMENTS

The Contractor must be able to work closely with both the CSO as well as its multi-national authoring community on an individual and group basis in order to facilitate the professional and timely editing and publishing of the scientific material described above. In particular, the Contractor will be required to provide the following services:

- Project Management
- Editorial
- Layout and Format
- Quality Assurance

A description of the work to be performed within each of the above services is detailed at paragraph 4 below.

Unless otherwise notified, TRs are processed as they are submitted, it being the task of the CSO Contract Manager to establish the editorial priorities

The process used to edit and publish the scientific materials is streamlined and shared between the CSO and the Contractor. Once the raw material has been submitted to the Contractor, there are different steps to go through before a publication is finalized. The process is essentially a 3 step process as follows:

Step 1 –Pre-Release. This step involves the initial pre-release⁶ of the Technical Report, usually within 1 working week (5 working days).

Step 2 – Editorial and Layout.

The first step in the process is primarily to establish contact between the Editorial Staff assigned to this phase and the Author(s) of the Technical Report. During this stage, the Editor will work with the Author(s) to establish the overall structure of the Technical Report and identify any editorial issues that may affect the work to be done. Ultimately, this step is to help the author deliver a clear, coherent report to the intended scientific audience.

Following this initial work, the report needs to undergo a more extensive edit looking at grammar, spelling, punctuation, and style, ultimately ensuring consistency and accuracy of the report. Some reports may require a heavy edit while others only need a light edit, this being dependent on the received text.

Once the report has been edited to the satisfaction of the Editorial Team, Report Author(s) and the TG Chair, the report needs to be provided to the CSO in the following formats:

- Formatted PDF (Optimised for Web Publishing and Download, see para 4.3.1 below)
- E-Book (see paragraph 4.3.2 below)

Notes

- i. This time taken for Step 2 can vary due to the nature of the editorial issues and the availability and response time of the Author, but must be completed with 12 working weeks following the completion of Step 1 (Pre-Release).
- ii. Although the CSO's preference is for a single editor to work both the initial work and follow on detailed editorial work for a particular Technical Report, the contractor is free to use any member of the editorial team during the editorial process.
- iii. As part of the response to the Call for Bid, potential contractors are invited to submit a suggested workflow for Step 2 as outlined above, based upon their own experience.

~~Step 3 – Final QA and Publishing – this step is performed by the CSO and is outside of the scope of this contract.~~

⁶ Pre-Release requirements will be defined in the Call for Bid

4. DETAILED REQUIREMENTS

4.1 Project Management

The Contractor is required to appoint a single Project Manager for the contract. The Project Manager will be the single point of contact between the Contractor, the CSO Contract Manager and the STO Scientific Community. The Project Manager will be required to:

- Project-manage the Editorial work for all TRs.
- For each TR, ensure that it is Pre-Released in accordance with Step 1 above within 5 working days after receipt of the Publication from the CSO.
- For each TR, ensure contact is made between the Contractor's Editorial Staff assigned to the publication and the TG Chair or designated Author within the first 2 weeks after receipt of the Publication from the CSO. Further, the Project Manager is to ensure that all Email correspondence between Editor and Author is copied to the CSO Publications Office.
- For each TR, propose an editorial timescale with key dates that will be agreed between Contractor and CSO.
- For each TR, ensure that the editorial and layout work is complete, and that the Publication is ready for final QA and Publishing by the CSO, within 13 working weeks⁷ after receipt of the Publication from the CSO.
- Provide to the CSO Contract Manager within five (5) working days following the end of the preceding calendar month a report with accurate records on the status of all publications being worked on.
- Provide to the CSO Contract Manager such report outside this monthly cycle if requested by the CSO Contract Manager.

Further,

- The CSO Contract Manager ensures that issues identified by the Contractor outside his/her powers of influence are addressed without further delay once they are raised with a view to facilitate progress, reduce delays and control costs. The Contractor shall raise such issues in writing via the monthly report or by e-mail to CSO Contract Manager.
- A copy of the above reports shall be submitted in combination with the monthly invoice as supporting documentation to the CSO P&C Officer.
- The CSO Contract Manager will validate the reports within five (5) working days upon receipt and report in writing to the Contractor his/her agreement and/or any observations.

⁷ 13 working weeks (1 week Pre-Release plus 12 weeks editorial and layout) applies to a Technical Report of up to 400 pages. An additional week will be provided for every further 100 pages, so for example a TR of 750 pages would require 13 weeks + 4 x 1 week giving a total of 17 weeks.

4.2 Editorial (part of Step 2 above)

The Editorial Staff employed by the company are required to provide the following services:

After review of received documents for integrity, read and edit scientific documents for the following purpose:

- To ensure consistency in writing style, use of acronyms, abbreviations, spelling, indexing, referencing, page layout, text layout, hyper linking;
- To identify and correct typographical and grammatical errors; and
- To identify and correct errors in text, such as incorrect numbering, referencing, missing symbols/tables/ figures/equations.
- Enhance and/or optimize embedded graphics and equations.

Note that the CSO may on occasion request a report of all queries arising from the editorial work specific to a TR. Such a report must address the detailed information on the query itself (type of query, location within document, etc.), and wherever possible, provide suggestions on how to address any issues raised in the query.

4.3 Layout and Format (part of Step 2 above)

4.3.1 PDF Version.

The Layout requirements fall into two categories; namely

- Main Body of Report
- Supplementary Supporting Documents

For the Main Body of the Report:

Format source text documents into the STO style using STO templates⁸:

- Format headers/footers/footnotes;
- Format text;
- Format figures/tables/equations (some graphics may require substantial editing and/or re-creation); and
- Format hyperlinks.

For Supplementary Supporting Documents:

Format all supplementary documents provided, such as PowerPoint presentations or additional PDF documents:

- Incorporate classification (when required);

Note: Supplementary Supporting Documents will be placed into an Annex of the Main Report.

⁸ Copies of STO Templates can be downloaded from the Author Support page of the STO Website – <https://www.sto.nato.int/Pages/support-for-authors.aspx>

For both the Main Body and Annexes, create a single PDF optimised for internet publishing and download:

- Convert source document to PDF (generating bookmarks where required);
- Where required, incorporate hyperlinks to external documents;
- Format bookmarks according to standard layout⁹; and
- Review text to ensure that the document converted properly (some graphics may require substantial editing and or re-creation).

4.3.2 E-Book Version.

An E-Book version needs to be created with the following criteria:

- able to be rendered as a Web Page (cross Browser),
- able to be rendered cross platform, for example Smart Phone, Tablet and Computer,
- compatible with standard e-Readers,
- suitably marked up so as to be exploitable for purposes such as content extraction.

Notes:

- i. the format and style to be determined between Contractor and CSO,
- ii. the Contractor is invited to provide suggestions and examples of underlying formats that meet the above criteria.

4.4 Quality Assurance (part of Step 2 above)

The Contractor is required to assure that all editing and formatting of STO scientific documents is thoroughly checked before it is submitted to the CSO and the authoring community for their review and approval. The CSO will perform a final Quality Assurance after the end of the complete process¹⁰.

In particular, the Contractor will be required to perform the following Quality Assurance tasks:

Document Quality Assurance:

- Compare original source text print-out with print-out of final PDF version to ensure the integrity of the following: text, figures, tables, equations;
- Proofread headers/footers/footnotes to ensure accuracy of information and formatting;
- When required, ensure correct security classification is noted on all documents;

⁹ Example TRs can be downloaded from the STO Website -
https://www.sto.nato.int/publications/Pages/Technical_Reports_List.aspx

¹⁰ The CSO reserves the right to return the TR to the Contractor for correction should it contain errors.

- Ensure that the correct template has been used for the text;
- Ensure that the correct formatting has been used for the text – checking text (format and spacing), headings, bullets, figures, captions, footnotes, references, etc.;
- For Supplementary Supporting Documents, ensure that all extraneous files, such as PowerPoint presentations and Excel files, carry the correct document marking; and
- Identify formatting errors, such as: widow text, orphan text, improper spacing, etc.

Electronic Quality Assurance:

For the PDF Version:

- Ensure that PDF files open in the proper view according to the type of scientific publication;

For both PDF and E-Book versions:

- Ensure that bookmarks are formatted according to standard layout;
- Proofread bookmarks against text to ensure the integrity of the information;
- Ensure that all bookmarks are linked to the appropriate location;
- Ensure that all hyperlinks to external documents are formatted correctly and that the links are functioning; and
- Ensure that all electronic documents associated with publication are named according to standard file nomenclature.

For the E-Book version:

- Ensure that the E-Book renders correctly on Smart Phone, Tablet and Computer
- Ensure that the E-Book renders correctly across all major Internet Browsers (Chrome, Firefox, I.E. and Safari) and eReaders.

5. Competencies & Language

The contractor shall provide Curriculum Vitae (CV) or résumés for all editorial staff proposed for the contract, along with that of the Project Manager. As a minimum, all staff employed during the editorial phase must have:

- Experience in Electronic Publishing
- Experience in Scientific Publishing
- English language equivalent to NATO STANAG 6001 (levels: 5,5,5,5) or the Common European Framework of Reference for Languages (CEFR) level C2

6. Records

The Contractor will keep proper and detailed accounts and records solely relating to this Contract. All such accounts and records will be open to audit and inspection by any

authorised representatives of CSO who may make copies and take extracts. The Contractor will provide reasonable facilities and any information related to these audits. The Contractor will keep the accounts and records for two (2) years from the end of the calendar year following the completion of the Contract, such records being kept in an independent storage facility.

The Contractor will retain all original material relating to each publication for twelve months after the date of distribution of the publication (costs for the storage of this material will be the responsibility of the Contractor). Sufficient other material to enable the publication to be recreated easily shall be retained for twenty-four months after the date of publication.

7. Electronic Backups and Archiving

The Contractor will be required to perform daily backups of all electronic files associated with STO publications. All such backups and associated records will be open to audit and inspection by any authorised representatives of CSO.

Once a publication has been officially published by the STO, the Contractor will be responsible for the archiving of all electronic files associated with the publication. The Contractor is also responsible for established appropriate storage for all archived files.

8. Travel

Upon request from the CSO, it could be necessary for the Contractor to visit the CSO Headquarters in Neuilly-sur-Seine (adjacent to Paris, France).

CSO will then pay for the Contractor's travel and per diem according to NATO rules.

For other travels, as may be deemed necessary by the Contractor, the Contractor will support all the related costs.

For all travel, the Contractor will be responsible for the arrangement and financing of all medical and insurance cover for staff whilst on official CSO business.

9. Translation of Executive Summaries

As outlined in par 2, each TR comes with a separate Executive Summary. This is a text only document covering no more than a single page of A4. This document is (separately) translated into French (Synthèse) and is included in the report alongside the English Executive Summary.

As an option to this contract, potential Contractors are invited to tender for this translation work. When submitting their bid, potential Contractors are requested to list the price for this work separately from the main Editorial work described in this Annex.

10. Common Frequently Asked Questions

Below are some of the more commonly asked questions we have received in the past from perspective bidders for this contract.

Q: Does the editorial work involve any creative writing, as opposed to adapting and homogenizing texts with proofreading and correction of spelling and grammar?

A: There are no requirements for creative writing.

Q: Is the Contractor required to demonstrate specific scientific knowledge?

A: Subject matter expertise is not a requirement for the editorial staff; however, a broad overview of the subjects being edited is expected. In this respect, the Editor must liaise very closely with the authoring community so as to be able to understand and avoid any ambiguities in the texts.

Q: Is the Contractor required to work during holiday periods (for example July/August)?

A: Yes, NATO and the scientific community both work during this period requiring the need for editorial services.

Q: In addition to the dedicated team, is it necessary for the person performing the layout to understand everyday English, given that the Project Manager supervises all the work?

A: There is no requirement for staff employed performing layout to have a working knowledge of English, only the Editorial Staff must be fluent in English (as defined in Para 5 above).

Q: Do the respective academic authors write their texts/presentations based on a specific style guide?

A: Authors are required to use a style guide only with reference to the layout of their reports. This guide is provided in the form of an MS Word template.

Q: Are the embedded graphics created by the authors or would this be the responsibility of the Contractor?

A: The embedded graphics are created by the Authors, and in some cases Authors supply the originals separately (usually JPEG or PNG). This is, however, not a requirement.

Q: Do all team members have to be salaried employees or will it be possible to take on freelancers to cover peak periods (after your clearance/verification)?

A: Contractors are free to subcontract any work as long as the CSO is informed in advance and that the necessary security requirements are met. Normally, we would expect Contractors to have identified any sub-contractors at the time of the bid.

Note: under no circumstances shall any work under this Contract be performed other than in a NATO nation and by personnel from a NATO country.

Q: Are there any restrictions on what software is to be used in the production of the final PDF?

A: The source files will be provided to the Contractor mostly in MS Word (occasionally Latex). The choice of which desk top publishing software to use thereafter is entirely up to the Contractor.

Q: Are the majority of your authors native English speakers?

A: Not all of our authors are native English speakers, however, they submit their reports in English and the English should therefore be corrected by the Contractor.



ANNEX 2

- TECHNICAL SPECIFICATIONS -

TO

CONTRACT

EDITORIAL SERVICES FOR

CLASSIFIED SCIENTIFIC REPORTS

1. SCOPE

The scope of this Contract is to provide Editorial Services and Electronic Publishing of the NATO Science and Technology Organisation's (STO) Scientific Classified Technical Reports; namely, those bearing a security classification NATO Restricted, NATO Confidential or NATO Secret.

The publications to process, known generically as Classified Technical Reports (hereafter referred to simply as TR), are the result of scientific studies carried out on behalf of the STO. These study groups are typically known as Task Groups (TG).

TRs range from around 50 to 500 pages, the average size being 200 pages. The material includes a large number of embedded graphics and scientific equations. They are submitted to the Contractor as they are delivered to the CSO. On average, around ten (10) TRs are processed and published per year. It must be understood that these figures represent the average amount of work that will be provided to the Contractor in any given year. Whilst the CSO will provide reports to the Contractor as and when they are received from the authoring community, a fixed number of reports per month cannot be guaranteed. Consequently, it is understood that there may be some peaks and troughs in the flow of work provided to the Contractor.

The source format of TRs submitted to the Contractor will be Microsoft Word.

The source language for all TRs will be English, however, in the majority of cases the text will have been written by non-native English speakers.

Following the editorial process for each TR, the following product is to be delivered to the CSO:

- Formatted PDF¹

2. TR COMPONENTS AND RESPONSIBILITIES

A TR is made up of the following components:

- Front Cover
- Copyright Page
- Table of Contents
- Executive Summary and Synthèse²
- Panel Page (list of TR Contributors)
- Report Body

¹ PDF optimized for web publishing and download

² An option in the Contract is for the translation of the Executive Summary from English to French – see para 10

- Report Annexes (Supplementary Supporting Documents)
- Report Documentation Page (Meta Data)

The following table details the responsibilities for the production and editing of the above components.

Component	Responsibility for PDF
Front Cover	CSO to provide formatted PDF. Contractor to include in final report.
Copyright Page	CSO to provide formatted PDF. Contractor to include in final report.
Table of Contents	Contractor to create
Executive Summary	CSO to provide in MS Word. Contractor to include only if received before the end of Step 2 (below)
French Translated Executive Summary (Synthèse)	Option 1: CSO to provide in MS Word (French version). Contractor to include in final report . Option 2: CSO to provide in MS Word (English version). Contractor to translate ³ into French and include in final report
Panel Page	CSO to provide formatted PDF. Contractor to include in final report.
Report Body	Contractor to create based on Report Body
Report Annexes (Supplementary Supporting Documents)	Contractor to compile from supplied source report. Minimal editorial effort required – see para 4.3.1.
Report Documentation Page	CSO to provide formatted PDF. Contractor to include in final report.

³ An option in the Contract is for the translation of the Executive Summary from English to French – see para 10

3. CONTRACT REQUIREMENTS

The Contractor must be able to work closely with both the CSO as well as its multi-national authoring community on an individual and group basis in order to facilitate the professional and timely editing and publishing of the scientific material described above. In particular, the Contractor will be required to provide the following services:

- Project Management
- Editorial
- Layout and Format
- Quality Assurance

A description of the work to be performed within each of the above services is detailed at paragraph 4 below.

Unless otherwise notified, TRs are processed as they are submitted, it being the task of the CSO Contract Manager to establish the editorial priorities

The process used to edit and publish the scientific materials is streamlined and shared between the CSO and the Contractor. Once the raw material has been submitted to the Contractor, there are different steps to go through before a publication is finalized. The process is essentially a 2 step process as follows:

Step 1 – Editorial and Layout.

The first step in the process is primarily to establish contact between the Editorial Staff assigned to this phase and the Author(s) of the Technical Report. During this stage, the Editor will work with the Author(s) to establish the overall structure of the Technical Report and identify any editorial issues that may affect the work to be done. Ultimately, this step is to help the author deliver a clear, coherent report to the intended scientific audience.

Following this initial work, the report needs to undergo a more extensive edit looking at grammar, spelling, punctuation, and style, ultimately ensuring consistency and accuracy of the report. Some reports may require a heavy edit while others only need a light edit, this being dependent on the received text.

Once the report has been edited to the satisfaction of the Editorial Team, Report Author(s) and the TG Chair, the report needs to be provided to the CSO in the following formats:

- Formatted PDF (Optimised for Web Publishing and Download, see para 4.3.1 below)

Notes

- i. This time taken for Step 1 can vary due to the nature of the editorial issues and the availability and response time of the Author, but must be completed within 12 working weeks following receipt of the TR.
- ii. Although the CSO's preference is for a single editor to work both the initial work and follow on detailed editorial work for a particular Technical Report, the

contractor is free to use any member of the editorial team during the editorial process.

- iii. As part of the response to the Call for Bid, potential contractors are invited to submit a suggested workflow for Step 1 as outlined above, based upon their own experience.

Step 2 – Final QA and Publishing – this step is performed by the CSO and is outside of the scope of this contract.

4. DETAILED REQUIREMENTS

4.1 Project Management

The Contractor is required to appoint a single Project Manager for the contract. The Project Manager will be the single point of contact between the Contractor, the CSO Contract Manager and the STO Scientific Community. The Project Manager will be required to:

- Project-manage the Editorial work for all TRs.
- For each TR, ensure contact is made between the Contractor's Editorial Staff assigned to the publication and the TG Chair or designated Author within the first 2 weeks after receipt of the Publication from the CSO. Further, the Project Manager is to ensure that all Email correspondence between Editor and Author is copied to the CSO Publications Office.
- For each TR, propose an editorial timescale with key dates that will be agreed between Contractor and CSO.
- For each TR, ensure that the editorial and layout work is complete, and that the Publication is ready for final QA and Publishing by the CSO, within 12 working weeks⁴ after receipt of the Publication from the CSO.
- Provide to the CSO Contract Manager within five (5) working days following the end of the preceding calendar month a report with accurate records on the status of all publications being worked on.
- Provide to the CSO Contract Manager such report outside this monthly cycle if requested by the CSO Contract Manager.

Further,

- The CSO Contract Manager ensures that issues identified by the Contractor outside his/her powers of influence are addressed without further delay once they are raised with a view to facilitate progress, reduce delays and control costs. The Contractor shall raise such issues in writing via the monthly report or by e-mail to CSO Contract Manager.

⁴ 12 working weeks applies to a Technical Report of up to 400 pages. An additional week will be provided for every further 100 pages, so for example a TR of 750 pages would require 12 weeks + 4 x 1 week giving a total of 16 weeks.

- A copy of the above reports shall be submitted in combination with the monthly invoice as supporting documentation to the CSO P&C Officer.
- The CSO Contract Manager will validate the reports within five (5) working days upon receipt and report in writing to the Contractor his/her agreement and/or any observations.

4.2 Editorial (part of Step 2 above)

The Editorial Staff employed by the company are required to provide the following services:

After review of received documents for integrity, read and edit scientific documents for the following purpose:

- To ensure consistency in writing style, use of acronyms, abbreviations, spelling, indexing, referencing, page layout, text layout, hyper linking;
- To identify and correct typographical and grammatical errors; and
- To identify and correct errors in text, such as incorrect numbering, referencing, missing symbols/tables/ figures/equations.
- Enhance and/or optimize embedded graphics and equations.

Note that the CSO may on occasion request a report of all queries arising from the editorial work specific to a TR. Such a report must address the detailed information on the query itself (type of query, location within document, etc.), and wherever possible, provide suggestions on how to address any issues raised in the query.

4.3 Layout and Format (part of Step 1 above)

The Layout requirements fall into two categories; namely

- Main Body of Report
- Supplementary Supporting Documents

For the Main Body of the Report:

Format source text documents into the STO style using STO templates⁵:

- Format headers/footers/footnotes;
- Format text;
- Format figures/tables/equations (some graphics may require substantial editing and/or re-creation); and
- Format hyperlinks.

For Supplementary Supporting Documents:

⁵ Copies of STO Templates can be downloaded from the Author Support page of the STO Website – <https://www.sto.nato.int/Pages/support-for-authors.aspx>.

Format all supplementary documents provided, such as PowerPoint presentations or additional PDF documents:

- Incorporate classification (when required);

Note: Supplementary Supporting Documents will be placed into an Annex of the Main Report.

For both the Main Body and Annexes, create a single PDF optimised for internet publishing and download:

- Convert source document to PDF (generating bookmarks where required);
- Where required, incorporate hyperlinks to external documents;
- Format bookmarks according to standard layout⁶; and
- Review text to ensure that the document converted properly (some graphics may require substantial editing and or re-creation).

4.4 Quality Assurance (part of Step 1 above)

The Contractor is required to assure that all editing and formatting of STO scientific documents is thoroughly checked before it is submitted to the CSO and the authoring community for their review and approval. The CSO will perform a final Quality Assurance after the end of the complete process⁷.

In particular, the Contractor will be required to perform the following Quality Assurance tasks:

Document Quality Assurance:

- Compare original source text print-out with print-out of final PDF version to ensure the integrity of the following: text, figures, tables, equations;
- Proofread headers/footers/footnotes to ensure accuracy of information and formatting;
- When required, ensure correct security classification is noted on all documents;
- Ensure that the correct template has been used for the text;
- Ensure that the correct formatting has been used for the text – checking text (format and spacing), headings, bullets, figures, captions, footnotes, references, etc.;
- For Supplementary Supporting Documents, ensure that all extraneous files, such as PowerPoint presentations and Excel files, carry the correct document marking; and
- Identify formatting errors, such as: widow text, orphan text, improper spacing, etc.

⁶ Example Unclassified TRs (same format as for Classified) can be downloaded from the STO Website - https://www.sto.nato.int/publications/Pages/Technical_Reports_List.aspx.

⁷ The CSO reserves the right to return the TR to the Contractor for correction should it contain errors.

Electronic Quality Assurance:

- Ensure that PDF files open in the proper view according to the type of scientific publication;
- Ensure that bookmarks are formatted according to standard layout;
- Proofread bookmarks against text to ensure the integrity of the information;
- Ensure that all bookmarks are linked to the appropriate location;
- Ensure that all hyperlinks to external documents are formatted correctly and that the links are functioning; and
- Ensure that all electronic documents associated with publication are named according to standard file nomenclature.

5. Competencies & Language

The contractor shall provide Curriculum Vitae (CV) or résumés for all editorial staff proposed for the contract, along with that of the Project Manager. As a minimum, all staff employed during the editorial phase must have:

- Experience in Electronic Publishing
- Experience in Scientific Publishing
- English language equivalent to NATO STANAG 6001 (levels: 5,5,5,5) or the Common European Framework of Reference for Languages (CEFR) level C2
- NATO Secret Security Clearance⁸

6. Records

The Contractor will keep proper and detailed accounts and records solely relating to this Contract. All such accounts and records will be open to audit and inspection by any authorised representatives of CSO who may make copies and take extracts. The Contractor will provide reasonable facilities and any information related to these audits. The Contractor will keep the accounts and records for two (2) years from the end of the calendar year following the completion of the Contract, such records being kept in an independent storage facility.

The Contractor will retain all original material relating to each publication for twelve months after the date of distribution of the publication (costs for the storage of this material will be the responsibility of the Contractor). Sufficient other material to enable the publication to be recreated easily shall be retained for twenty-four months after the date of publication.

⁸ Or National Equivalent which can be converted – please refer to Appendix 1 to Annex 2 - Security Aspects

7. Electronic Backups and Archiving

The Contractor will be required to perform daily backups of all electronic files associated with STO publications. All such backups and associated records will be open to audit and inspection by any authorised representatives of CSO.

Once a publication has been officially published by the STO, the Contractor will be responsible for the archiving of all electronic files associated with the publication. The Contractor is also responsible for established appropriate storage for all archived files.

8. Use of CSO Office Facilities

The CSO Office premises, including equipment such as a telephone and Tempest workstation, can be made available to the contractor upon request.

Should this be the case, the Contractor will be responsible for the arrangement and financing of all medical and insurance cover for staff whilst working at the CSO premises. Further, the Contractor is responsible for maintaining the Security Clearances of staff working at the CSO.

9. Travel

Upon request from the CSO, it could be necessary for the Contractor to visit the CSO Headquarters in Neuilly-sur-Seine (adjacent to Paris, France).

CSO will then pay for the Contractor's travel and per diem according to NATO rules.

For other travels, as may be deemed necessary by the Contractor, the Contractor will support all the related costs.

For all travel, the Contractor will be responsible for the arrangement and financing of all medical and insurance cover for staff whilst on official CSO business.

10. Translation of Executive Summaries

As outlined in par 2, each TR comes with a separate Executive Summary. This is a text only document covering no more than a single page of A4. This document is (separately) translated into French (Synthèse) and is included in the report alongside the English Executive Summary.

As an option to this contract, potential Contractors are invited to tender for this translation work. When submitting their bid, potential Contractors are requested to list the price for this work separately from the main Editorial work described in this Annex.

11. Common Frequently Asked Questions

Below are some of the more commonly asked questions we have received in the past from perspective bidders for this contract.

Q: Does the editorial work involve any creative writing, as opposed to adapting and homogenizing texts with proofreading and correction of spelling and grammar?

A: There are no requirements for creative writing.

Q: Is the Contractor required to demonstrate specific scientific knowledge?

A: Subject matter expertise is not a requirement for the editorial staff; however, a broad overview of the subjects being edited is expected. In this respect, the Editor must liaise very closely with the authoring community so as to be able to understand and avoid any ambiguities in the texts.

Q: Is the Contractor required to work during holiday periods (for example July/August)?

A: Yes, NATO and the scientific community both work during this period requiring the need for editorial services.

Q: In addition to the dedicated team, is it necessary for the person performing the layout to understand everyday English, given that the Project Manager supervises all the work?

A: There is no requirement for staff employed performing layout to have a working knowledge of English, only the Editorial Staff must be fluent in English (as defined in Para 5 above).

Q: Do the respective academic authors write their texts/presentations based on a specific style guide?

A: Authors are required to use a style guide only with reference to the layout of their reports. This guide is provided in the form of an MS Word template.

Q: Are the embedded graphics created by the authors or would this be the responsibility of the Contractor?

A: The embedded graphics are created by the Authors, and in some cases Authors supply the originals separately (usually JPEG or PNG). This is, however, not a requirement.

Q: Do all team members have to be salaried employees or will it be possible to take on freelancers to cover peak periods (after your clearance/verification)?

A: Contractors are free to subcontract any work as long as the CSO is informed in advance and that the necessary security requirements are met. Normally, we would expect Contractors to have identified any sub-contractors at the time of the bid.

Note: under no circumstances shall any work under this Contract be performed other than in a NATO nation and by personnel from a NATO country.

Q: Are there any restrictions on what software is to be used in the production of the final PDF?

A: The source files will be provided to the Contractor mostly in MS Word (occasionally Latex). The choice of which desk top publishing software to use thereafter is entirely up to the Contractor.

Q: Are the majority of your authors native English speakers?

A: Not all of our authors are native English speakers, however, they submit their reports in English and the English should therefore be corrected by the Contractor.

