

ANNEX I TO THE INVITATION TO TENDER

TENDER SPECIFICATIONS

Media relations and outreach – Information events for the media

OPEN CALL FOR TENDERS

PO/2016-12/A2

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1. OBJECTIVE AND CONTEXT

In his Political Guidelines for the Commission, President Jean-Claude Juncker stated as his "key task to rebuild bridges in Europe after the crises. To restore European citizens' confidence. (...) And to strengthen democratic legitimacy on the basis of the Community method." Moreover, the President included in the mission letters to the Members of the Commission the importance of being "in dialogues with citizens, by presenting and communicating the Commission's common agenda, listening to ideas and engaging with stakeholders."

Against this backdrop, the European Union needs to constantly inform the media about its policies, in order to help better understanding by citizens and stimulate public debate.

This call for tenders is inter-institutional. The following institutions and bodies are involved: the European Commission, the European Parliament, the General Secretariat of the Council the European External Action Service, the European Economic and Social Committee, the European Union's Judicial Cooperation Unit (EUROJUST), the European Research Council Executive Agency (ERCEA) the European GNSS Agency (GSA), the European Union Agency for Network and Information Security (ENISA), the European Police Office (EUROPOL) the Single Resolution Board (SRB), the Innovative Medicines Initiative (IMI) and the Consumers, Health, Agriculture and Food Executive Agency (CHAFEA).

The European Commission, hereinafter referred to as the Commission, is the leading institution in this invitation to tender as well as the signatory of the framework contract on behalf of the other institutions involved.

2. SUBJECT OF THE CONTRACT

2.1. Services required

The contract is aimed at the provision of media relations and outreach services in the area of information events, social media engagement activities and network building.

For the purposes of this contract, the term "media" means individuals or organisations that reach significant audiences with an interest in a particular area of European Union policies. It includes audiovisual media, written press and online media, as well as bloggers and other public opinion leaders to the extent they address the EU in their communication.

The term "events" includes seminars and visits. The term "online events" includes online seminars (webinars) and other online information sessions.

Furthermore, this contract is meant primarily for actions with a European dimension, gathering media from one or several Member States, or from any other country, as needed.

The events under this framework contract will be designed, organised and managed by the contractor, who will be in charge of identifying possible participants and speakers, of the content of the programmes and of logistics, including participant management and support, in particular invitation, travelling and accommodation, in consultation with the ordering services as and when required.

Three modules have been designed for this contract.

The first module consists in the design and organisation of information seminars and study visits for media. These take place, primarily, at the seat of the European institutions in Brussels, or in any of the 28 EU Member States, but can also be held in the [candidate countries](#), the countries covered by the [EU neighbourhood policy](#) or any other country in the world.

The second module consists in the creation and organisation of online events for more specialised media. Depending on the subject and the available resources, they could be open to wider interested applicants.

The third module consists of preparatory or follow-up activities to the information events and sessions organised under modules 1 and 2, or any other media relations activity, to encourage network building and exchange among media based on their common interest for EU affairs and policies.

DESCRIPTION OF THE MODULES

MODULE 1

Organisation of events

This module will be used to organise information and debate events for the media in various places, as required by the ordering services.

This module concerns primarily consultancy services and can be associated to options concerning the necessary logistics (namely transport and accommodation of speakers and participants, venue, and catering).

For the purposes of the first module, groups will consist of minimum 12 participants gathered for a maximum of 2 days. However, with the agreement of the contractor, the ordering service may organise smaller groups and/or extend the duration of the event.

Group composition needs to reflect a certain balance to be defined by the ordering services (geographical, linguistic, gender, media type, or any other criterion described by the ordering service). If logistics packages are associated, the technical needs of the various participants need to be addressed to the highest possible level (e.g.: internet connection, vantage points for audiovisual media, sound drops, access to satellite feed, etc.).

Event programmes will be designed in a fluent, concise and journalistic style, allowing ample opportunity for interaction between participants and speakers. They must be tailored to cover the news and the political agenda of the European Commission.

Module 1 can be combined with any of the options listed hereunder. It can also involve multiple locations, as per the items described in the price list. In case significant logistical efforts are needed for transfers between locations, the price for option 1 can be charged again in the price schedule set for the new location.

Events under module 1 should take place no sooner than 8 weeks from the date of signature of the specific contract, to allow enough time for the contractor to

prepare the seminar. However, with the agreement of the contractor, this period can be shortened.

Services to be delivered as part of module 1:

A. Assistance in defining the best theme and programme for the event

The contractor will assist the ordering service in defining objectives and finding the best approach to the required information event, in terms of angle, scope and target audience, with particular emphasis on newsworthiness, number and diversity of views. The contractor will draw up the programme of the event, including the names of the proposed speakers. Once approved by the Commission, he will be in charge of contacting and inviting the external speakers.

B. Identifying and inviting media participants

The contractor will use its proven experience and its established networks to reach and invite relevant media. Each proposal will be justified upon demand, especially regarding the profile of the organisation, the professional profile of the participating representative, and how they both match the characteristics of the intended target audience. The contractor will also be in charge of inviting the participants proposed by the ordering service upon demand from the latter, and will organise transport and accommodation, if needed.

C. Preparing the information package for participants

The contractor will provide the participants with a complete information package by email, including the event programme, 5 days before the beginning of the seminar at the latest. If required, the contractor will collect and deliver on the day of the event, or after the event, the information sources mentioned during the event (web resources, titles and authors of studies, etc.), the presentations used by the participants (provided the contractor is able to clear intellectual property rights), as well as any other relevant material provided by the ordering service.

The package must also include an evaluation form to assess the quality of the event. The evaluation form will be drafted by the contractor and submitted to the ordering service for approval.

D. Managing the event day

The contractor will make sure that the appointed project manager and assisting staff are present on the seminar date, in order to oversee the smooth running of the seminar (including the filling in of the evaluation forms), provide guidance to participants and troubleshoot when needed. All needed arrangements concerning the safety and security of the participants, speakers and organisers lie directly within the responsibility of the contractor.

E. Assessment of the seminar

The contractor will deliver the final report of the seminar, concentrating on: generated coverage; benchmarking against the initially set objectives and reasons for possible conspicuous shortcomings; outcome of the evaluation forms filled in by participants, and operational and strategic recommendations for the future. The contractor needs to proactively contact participants and search for materials published following the event. The identified material (press clippings a.s.o.) will be referenced in the report. The final structure of the report will be agreed with the ordering service.

On top of the core activities, several options can be associated to module 1.

Module 1 contains the following options:

Option 1: Transport and accommodation. The ordering service can ask the contractor to organise transport (including local transport, where local conditions allow it) and accommodation for participants and/or outside speakers invited to the event. The cost of transport and accommodation will be invoiced to the ordering service based on the real cost incurred (see "Reimbursements, Article II.22 of Annex II to the Invitation to Tender).

Option 2: Venue. The contractor can be required to identify and provide a suitable venue for the event. The venue quoted in the price list must seat comfortably the foreseen number of journalists and must be suitable for the requested services (proper public address systems, noise proof, appropriate lighting and ventilation, a.s.o.).

Upon request from the ordering service, the contractor might be asked to present a higher quality (or specification) option, adding the price supplement quoted in the price list. A higher quality option can be based on:

- Status of venue – recognised landmark or iconic building
- Position of venue (e.g. close to city centre or other major points of interest, when this position has a visible effect on venue prices in the area)
- Superior facilities (e.g. state of the art projection, sound system, dinner / cocktail room, special decorations etc.).

Only invited media representatives count towards the number of participants mentioned in the price list. Invited speakers or contractor staff are explicitly excluded from this count.

Option 3: Catering. The contractor might be required to identify and provide catering services, especially when a networking lunch or dinner is proposed as part of the contract.

The contractor will be responsible for booking and organising sit-down buffet service and coffee breaks based on the price list or, upon specific request of the ordering service, other types of catering according to specific needs. The contractor shall make the necessary reservations for the appropriate number of people on the basis of a standard menu to be decided directly with the ordering service.

The menus referred to in the price list include:

- Seated dinner – choice of high standing 3-course menus, including at least one vegetarian menu, with waiters' service. A choice of aperitifs, white and red wines, mineral water, soft drinks and coffee must be included.
- Sit-down buffet service - a wide choice of hot and cold dishes that could include sandwiches, including a limited number of vegetarian dishes, one glass of wine and soft drinks – participants make their own choice from a buffet and bring their plates to the tables chosen.
- Welcome coffee / coffee break - choice of coffee/tea/water/juices with pastries and sandwiches.

Invited media representatives and invited speakers count towards the number of participants for the purposes of this option.

Option 4: Interpretation on the seminar premises. EN or FR into and from any other official EU language or any other language, depending on the country of delivery and/or participants.

Option 5: Additional periods, either for a longer seminar or reporting on-the-spot and making contacts.

Option 6: Insurance services. Upon request from the ordering service, the contractor will undertake insurance services for the participants (including contractor staff). The scope of the insurance will be agreed with the ordering service.

In exceptional cases, involving particularly the European Commission's Visitors Centre, the contractor might be required to provide the services described under Option 1 separately from all the other services described in Module 1.

TASKS ASSOCIATED WITH MODULE 1

A. Role of the ordering service

- Outline of objectives, programme and key themes in cooperation and coordination with the contractor.
- Provision of key speakers from the EU institutions (Members of the European Parliament, Commissioners, Directors-General, high officials).
- Input in the selection of event participants; the size of the groups involved should be of a minimum of 12 participants; however, with the agreement of the contractor, this number can be reduced.
- Provide answers to specific questions from participants or provide the contractor with the right resources to enable him to provide a reply.

B. Role of the contractor

Core tasks:

- Advice in setting objectives and selecting specific themes in coordination with the ordering service.
- Definition of the criteria for participation (constitution of the group) in coordination with the ordering service and proposal of a list of participants.
- Providing data that would justify individual applications, especially in what concerns the profile of the represented media and likely target audience.
- Preparation of the detailed programme for the event in coordination with the ordering service. Where required by the ordering service, all documents distributed to participants need to respect the [visual identity](#) of the organising institution, agency or body.
- Invitation of speakers in coordination with the ordering service. Speakers will come from Commission services and Delegations, any other EU institution or agency hosting the event and outside bodies such as think tanks, universities, international organisations, employers' associations, labour unions, trade associations, NGOs, and all other organisations with an interest and a relevant contribution to the subject matter of the seminar.
- Invitation of event leaders/facilitators.
- Dispatch of invitations to participants.
- Production of the content of the event in relation to the subject to be covered (programme, necessary presentations, background material and fiches and all other necessary elements), including all necessary translations.
- Selection and preparation of documentation in coordination with the ordering service (such as Commission communications, White Papers and other documents, academic studies, Eurobarometer surveys, various other publications a.s.o).

- Production of a welcome package, taking into account the input of the ordering service.
- Assistance to participants in making contact with EU and national officials, as well as with other participants during the event.
- Ensuring the smooth running of the event (e.g. assistance to participants and problem solving when necessary during the event).
- Answering questions from participants. Up to 7 working days after the event, journalists are entitled to pose questions to the contractor, who should answer them within one working day (except for matters of exceptional complexity).
- General administrative and secretarial tasks.
- Management of the evaluation of each information event by the participants and analysis of the results, especially in terms of impact and follow-up.
- Taking all the necessary arrangements for the security and safety of the participants.

All costs linked to the services above must be included in the price lists (annex V) under flat rate prices for event management and consultancy (core tasks).

Tasks associated to Option 1:

- Organisation of travel and accommodation for participants and, where necessary, for speakers and event leaders.

The ordering service will cover the associated project management costs (as per the price list) and, in addition, reimburse to the contractor the expenses that are directly connected with the execution of the tasks on production of original supporting documents, including receipts and used tickets.

Travel expenses shall be reimbursed, where appropriate, on the basis of the shortest itinerary. Hotel rates will not exceed the ceilings authorised by the Commission as listed in Annex IV to the Framework Contract.

Participants will ideally be accommodated at the venue hosting the event. Should that prove impossible, hotels should be offered as close as possible to the meeting venue. Participants should be lodged individually. Having more than one participant in the same room can only be accepted in exceptional circumstances and with the agreement of all concerned participants.

In case of cancellation of a confirmed participation by a participant, the contractor will only be entitled to payment corresponding to the non-refundable costs incurred on the date of cancellation.

The contractor must take whatever steps are necessary to ensure that any requests for cancellation are settled in the best interests of the ordering service. Any additional costs due to negligence of the contractor will not be accepted.

- If the ordering service includes the participants' travel and accommodation expenses in the specific contract, the contractor will have to collect the supporting documents from the participants, check their conformity with the criteria mentioned in Article I.5.3 of the special conditions and Article II.22 of the General Conditions of the draft framework contract (Annex II to the Invitation to tender) and send these to the ordering service.
- All costs linked to the project management services above must be included in the price list (annex V) under flat rate prices for organising travel and accommodation.

Tasks associated to Option 2

- Identifying the necessary venue for the event and booking it, as per the request of the ordering service.
- Booking and renting of conference/audio-visual facilities and of the necessary technical and IT equipment and communication tools including computers and Internet access.
- All costs linked to the services above (including all costs associated to the rental of the venue and other facilities) must be included in the price lists (annex V) under flat rate prices for venue.

Tasks associated to Option 3

- Booking catering services, as required by the requesting service.
- All costs linked to the management of catering must be included in the price lists (annex V) under flat rate prices for catering.

Tasks associated to Option 4

- Providing interpretation, including booths and equipment when necessary.
- All costs linked to the services (including any type of interpretation : consecutive and simultaneous) above must be included in the price lists (annex V) under flat rate prices per language pair.

Tasks associated to Option 6

- Acquiring the necessary insurance coverage.
- The ordering service will reimburse to the contractor the expenses linked to the insurance coverage on production by the contractor of the supporting documents from the insurer.

General cancellation policy

The contractor shall communicate the cancellation policy covering travel, accommodation, catering, technical support and other related services. The contractor shall communicate the cancellation policy in writing, by indicating clear timeframes, refunds and related cancellation fees when submitting their offer.

MODULE 2

Organisation of online events

Module 2 covers online events.

The contractor needs to provide turn-key solutions, including all necessary IT development and support. If so requested, the contractor will collaborate with the Commission services to integrate specific actions organised under this contract within the Commission's web presence (embedding them on the Drupal-based EUROPA platform, providing stable URLs beforehand for publications, social media integration, as well as all other similar actions needed to ensure digital dissemination and publicity of the actions). The Commission's web presence is governed by the [Information Providers Guide](#) and its rules apply to any integration of specific actions mentioned above.

Activities under module 2 should be organised no sooner than 8 weeks from the date of signature of the specific contract, to allow enough time for the contractor to prepare the webinar/online course. However, with the agreement of the contractor, this period can be shortened.

For the purposes of this contract, an online event concerns an online seminar (or a webinar) or a structured online information session. A webinar represents a seminar or workshop shared with remote locations via the internet, using a scalable platform that is readily available for the end users. Webinars need to allow moderated interactivity between participants and the speakers/panels and/or the moderating and management team.

A structured online information session represents an information package, delivered via one or several stand-alone information modules, on a digital platform, allowing participants to follow it at varying paces. The platform needs to be scalable and shall be readily available for the end users. It also needs to allow support forums and discussion groups for participants.

For the purposes of this contract, online activities represent all activities associated to the webinar or to the structured online information sessions prepared via this module (online forums, discussion groups, etc.)

Services to be delivered as part of module 2:

A. Assistance in defining the best programme, structure and content package for the webinar or the structured online information session

The contractor will assist the ordering service in finding the best approach to the required online event, in terms of objectives, scope, angle (emphasis and policy highlights) and target audience. The contractor will therefore propose the programme of the session or the webinar and will contact and invite external speakers, where necessary, who can bring clarity and diversity to the debates or the courses. All the necessary technical arrangements (such as recording video conferences from guests) will be covered by the contractor.

B. Identifying and inviting media participants

The contractor will use his proven experience and his established networks to reach and entice relevant media to take part in the online event. The platform

needs to be able to track the number of attending participants and generate relevant statistics, with full respect of the rules and regulations related to privacy and personal data protection. In case an insufficient number of participants signed up, the ordering service can decide to cancel the event.

C. Preparing the webinar

If this module will be employed for the organisation of webinars, the contractor will fully prepare the webinar, including the creation of the content, presentations and all other necessary elements, taking into consideration suggestions and requests from the ordering service of the Commission, as well as the visual identity of the organising institution, agency or body, when required by the ordering service.

The contractor is responsible both for the content and invited live or recorded speakers (if applicable) and for its technical delivery via the online platform used to deliver the webinar.

The package must also include an evaluation form to assess the quality of the webinar.

D. Preparing the support for the structured online information session

If this contract module is needed for the organisation of structured online information sessions, the contractor will fully prepare the support and information modules (including the content), in all their components, taking into consideration suggestions and requests from the ordering service. The content and format will be validated by the ordering service.

The contractor is responsible both for the content of the support and for its technical delivery via the platform.

The package must also include an evaluation form to assess the quality of the structured online information session. The evaluation form will be drafted by the contractor and checked in coordination with the ordering service before validation.

E. Management of the webinar or of the structured online information session

The contractor will ensure the management of the activity, feeding and updating the technical platform, moderating debates and discussion forums, replying to questions and taking care of all needed interaction with the participants.

F. Assessment

The contractor will deliver the final report of the online event, concentrating on: uptake figures; drop-out rates; benchmarking against the initially set objectives and reasons for possible conspicuous shortcomings; evaluation of results; outcome of the evaluation forms filled in by the participants; operational and strategic recommendations for the future.

TASKS ASSOCIATED WITH MODULE 2

A. Role of the ordering service

- Outline of programme, target audience, objectives and key themes, in conjunction with the contractor.
- Validation of the content package.
- Provide answers to specific questions from participants or provide the contractor with the right resources for a reply.

B. Role of the contractor

- Fully maintaining the online platform used to deliver online events, adapting it for the purposes of each action (including internet services, domain registration a.s.o.).
- Creating the content (including recordings, presentations, quizzes, tests, interactive debates etc.) for the event.
- Selecting and preparing supporting documentation in coordination with the ordering service. The web implementation and documents distributed to participants need to respect the visual identity of the organising institution, agency or body. A link to the related guidelines will be provided in each specific contract.
- Production of a welcome package and gathering necessary background documentation (such as Commission documents, academic papers, course supports provided by the contractor a.s.o.).
- Delivering the content of the online event (including assistance to users) and ensuring its smooth unfolding.
- Moderating and maintaining individual activities. Replying to general queries by participants.
- Transferring the consolidated content package at the end of each online event to the ordering service, in formats of wide circulation (e.g.: PDF for documents and visuals, JPG for visuals, MP4 for video material a.s.o.).
- General administrative and secretarial tasks.
- Providing final report with suggestions for improvements.

The contractor assigns to the European Union all the rights of ownership and intellectual property rights, including copyright, vested in the content and packages of the webinars and online information sessions and courses, as provided in Articles I.10 and II.13 of Annex II to the Invitation to tender.

Where the content packages of the online events include the use of natural, identifiable persons' voice or image, the contractor shall obtain the necessary statements of these persons (or both parents' or persons exercising parental authority in case of minors), where they give permission for the described use of their image or voice, as provided in the conditions of the framework contract and subsequent specific contracts where applicable. For minors who reached the age of judgement their signature is also required.

General cancellation policy

The contractor shall communicate the cancellation policy covering technical support and other related services. The contractor shall communicate the cancellation policy in writing, by indicating clear timeframes, refunds and related cancellation fees when submitting their offer.

MODULE 3

Media relations and other services

In agreement with the ordering service, the contractor will provide media relations services, usually in connection with one of the two previous modules, on the political priorities of the Commission.

The services to be provided under this module aim at sustaining relations primarily – but not exclusively – based on the information activities carried out under modules 1 and 2, through interactivity, networking and community building. This includes the use of social media or online platforms, in particular professional networks, mailing lists, and other resources, already existing or designed for specific actions.

The contractor will use content provided by the ordering services and will adapt it as needed, seeking final validation from the ordering service. Actions undertaken as part of module 3 are, among others, establishing and updating mailing lists, producing or adapting content and distributing it to agreed sets of recipients, establishing, managing and curating social media resources, developing partnerships, etc.

The contractor is expected to adapt and manage if needed existing accounts or campaigns of the Commission or any other Institution having access to the framework contract.

Services to be delivered as part of module 3:

A. Media relations and campaign management

The contractor will advise and provide support in generating media uptake and social media debate, thus maximising the impact of the message to relevant target audiences. In doing so, the contractor may need to use promotion techniques on various platforms, including social media platforms, in agreement with the ordering service.

The contractor will produce all the necessary complementary supporting elements for individual actions under module 3, including graphic design, infographs, translations, etc.

The contractor will advise on and implement actions on social networks, online platform or traditional media with the aim of extending the reach of messages to relevant target audiences beyond those that can be reached organically. If needed, he will set up new or use existing accounts, as requested by the ordering service. Whenever needed, the ordering service will reimburse to the contractor any expenses linked to the promotion actions on social networks on production by the contractor of the supporting documents from the service provider.

B. Reporting

The contractor will collaborate with the ordering service to determine the baseline measurements used for benchmarking and to set measurable objectives for each networking action under module 3 which follow events organized within module 1 and/or 2.

The contractor will draw up timelines and develop measuring tools to monitor, report and evaluate the activities under module 3. He will report constantly in writing on the engagement and coverage generated by activities contracted under this module, in accordance with the indicators and timeline established in the specific contract.

The contractor will deliver the final report focusing on: quantitative aspects of the activities; qualitative assessment of the results; benchmarking against the initially set objectives and reasons for possible conspicuous shortcomings; strategic recommendations for the future.

TASKS ASSOCIATED WITH MODULE 3

A. Role of the ordering service

- Outline of target audience, objectives and key themes, in cooperation with the contractor.
- Provide input and guidance on the targeted policy area.
- Validate the approach and content.

B. Role of the contractor

- Explicitly present the strategy and methods they will use to reach the stated objectives, especially in terms of content and channels.
- Implement the agreed strategy.
- Implement agreed actions on social networks, online platforms or media and report on their impact.
- Engage with the target media and wider audiences via the relevant methods and reply to questions, comments, etc.
- Keep constant track of the outreach and coverage achieved, benchmarking against the agreed objectives; constantly inform the ordering service, in writing, about progress
- Provide final report with suggestions for improvements.

The contractor assigns to the European Union all the rights of ownership and intellectual property rights, including copyright, vested in the content and packages of the webinars and online information sessions and courses, as provided in Articles I.10 and II.13 of Annex II to the Invitation to Tender.

Where the materials include identifiable persons' voice or image, the contractor shall obtain the necessary statements of these persons (or of the persons exercising parental authority in case of minors) where they give their permission for the described use of their image or voice, as provided in the present contract. For minors who reached the age of judgement their signature is also required.

2.2.Reports

At 12-month intervals, starting from the date of signature of the Framework Contract, by the end of the period the contractor will submit to the Commission operational reports on the implementation of the contract:

- detailing consumption related to the Framework Contract (individual invoices, global consumption),
- any problems encountered and solutions related to the overall management of the Framework Contract and which cannot be covered via the individual Reports for each specific contract.

3. SIZE OF THE CONTRACT

The maximum budget for this framework contract is 20,000,000.00 euro over four years, VAT excluded.

Pursuant to Article 134(1)e and Article 134(4) of Commission delegated Regulation (EU) No 2015/2462 of 30 October 2015 amending Delegated Regulation (EU) No 1268/2012 on the rules of application of Regulation (EU, Euratom) No 966/2012 of the European Parliament and of the Council on the financial rules applicable to the general budget of the Union, the contracting authority may use a negotiated procedure for the award of new services which entail the repetition of similar services entrusted to the contractor who was awarded the original contract. That procedure may be used only during the three years following conclusion of the original contract.

4. CONTRACTUAL FRAMEWORK

The services specified above will be the subject of a Framework Contract drawn up between the European Commission (Directorate General for Communication, Unit for Corporate Communication Contracts and Services) and the tenderer to whom the contract is awarded. The draft contract is attached in Annex II to the Invitation to Tender.

In drawing up his bid, the tenderer should bear in mind the provisions of this draft contract and, notably:

Article I.4.	Appointment of the contractor and implementation of the FWC
Article 1.5	Prices
Article I.6	Payment arrangements
Article I.10	Exploitation of the results of the FWC
Article II.4	Provision of services
Article II.4.3	Compliance with minimum requirements including applicable obligations under environmental, social and labour law
Article II.13	Intellectual property rights
Article II.21	Payments and guarantees

5. SUBMISSION OF BIDS

The tenderer's bid must comprise all the documents required in the checklist in Annex IV to the Invitation to Tender – Part A. Part B of this annex lists the elements to be provided upon request at a later stage.

6. TECHNICAL TENDER

Tenderers should include in their bid a technical tender detailing how they will perform the tasks covered by the contract, in compliance with all the requirements of the tender specifications. This section should also detail their understanding of the role of this contract in the wider context of the EU communication and their approach to the fast-changing media landscape. Therefore the technical tender must comply with the most recent professional quality standards in the field of media and should describe the measures tenderers intend to apply in order to ensure that their working practices are in line with the normal technological advances in the field.

The rest of the technical tender should follow the same structure as the subject of the contract (see Point 2).

For the technical presentation, the contractors are expected to point out their intended workflow, methodology, research options, error detection systems, feedback cycles, general approach and specialised resources (databases, networks etc.) in relation to each of the three modules and the tasks described therein. Particular emphasis is placed on methodology to set objectives as well as the methods to assess the impact of actions. Given the EU-wide focus of the contract, the methods to deal with communication in the various official languages of the EU, as well as the means to secure local contacts and speakers also need to be explained. In case specific or proprietary IT tools and platforms are to be used (tools and platforms developed in-house by the contractor), a brief technical description is expected (this does not apply to general use tools, such as email clients, text processors, spreadsheet and presentation software as well as other software used on a regular basis in office environments).

The technical tender should not include any of the documents referred to under the exclusion or selection criteria, nor should it refer to issues already covered by the exclusion and selection criteria.

Only technical offers which meet all the minimum technical requirements listed below will be considered compliant and evaluated:

1. By submitting a tender, tenderers declare that their technical offer is compliant with applicable obligations under environmental, social and labour law established by Union law, national law and collective agreements or by the international environmental, social and labour law provisions listed in Annex X to [Directive 2014/24/EU](#).

2. Present the intended approach for all three modules separately, covering all tasks presented therein.

3. Draw up a proposition for handling the hypothetical case studies in Annex VI. The proposition should be structured according to the three modules detailed in this document. It must be realistic, and should not exceed an average 8 A4 pages for each case study.

The technical tender will be assessed in the light of the quality award criteria set out under point 9.

7. FINANCIAL OFFER

The financial offer must be quoted using the attached form in Annex V, which must be duly signed and dated.

The price(s) must be fixed and quoted in euros, including for countries which are not in the euro-area.

The price(s) must be all-inclusive and cover all costs related to performance of the contract as described above, including any translation of the documents needed for the events and the reporting related to the contract management.

8. EXCLUSION AND SELECTION CRITERIA

Compliance with exclusion and selection criteria is evaluated as follows:

At tender submission stage, tenderers should include the following documentation:

- the declaration of honour on exclusion and selection criteria in Annex III to the Invitation to Tender duly completed, dated and signed, together with the relevant evidence related to the remedial measures if applicable.

In the case of joint tenders, all economic operators involved in the tender must provide the declaration of honour on exclusion and selection criteria.

In the case of tenders involving subcontracting, the tenderer shall submit a separate declaration of honour on exclusion and selection criteria, duly dated and signed by each known subcontractors whose tasks represent more than 20% of the tasks of the contract or who help fulfil the selection criteria.

- the checklist of documents to be provided in Annex IV to the Invitation to Tender duly completed, together with the relevant evidence required as a result of answers to the questions in Part A (see remedial measures).

The other pieces of evidence listed in Part B of Annex IV may be requested by the contracting authority from any tenderer at a later stage. They will in all cases be requested from the winning tenderer before the signature of the FWC.

8.1. Exclusion criteria

Bids from tenderers who do not meet the exclusion criteria referred to in Articles 106 and 107 of the Financial Regulation¹ will not be considered for the award of the contract.

8.2. Selection criteria

The tenderer must demonstrate sufficient legal and regulatory, economic, financial, technical and professional capacity to be able to perform the tasks as specified in point 2 of these specifications.

An economic operator may, where appropriate and for a particular contract, rely on the capacities of other entities to achieve the required level of economic, financial and technical capacity, regardless of the legal nature of the links that it has with them (subcontractor, parent company, third party). It must in that case prove to the contracting authority that it will have at its disposal the resources necessary to perform the contract, for example by producing an undertaking on the part of those entities to place those resources at its disposal (see Point 8.3 below).

If a third party provides the whole or a very large part of the financial capacity, the contracting authority may demand that that entity signs the contract or that it provides a joint and several first-call guarantee, should that tender be awarded the contract.

¹ Regulation (EU, Euratom) 2015/1929 of the European Parliament and of the Council of 28 October 2015 amending Regulation (EU, Euratom) No 966/2012 on the financial rules applicable to the general budget of the Union - <http://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX:32015R1929>

a) Legal and regulatory capacity

The tenderer will provide a 'Legal Entity File (LEF)' and a 'Bank Account File (BAF)' duly completed and signed, with the necessary annexes. The forms to be used are available at the following addresses:

http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm

http://ec.europa.eu/budget/contracts_grants/info_contracts/financial_id/financial_id_en.cfm

For joint tenders, the LEF should be provided for each participating entity whereas the BAF is requested for the leader of the group only.

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

b) Financial and economic capacity

Evidence of financial and economic standing must be provided by the following documents:

A statement of overall turnover during the last three financial years, with a minimum of one million euro per year (that may be the combined annual turnover of the grouping in case of a joint tender or tender with identified subcontractors).

If, for some exceptional reason which the contracting authority considers justified, the tenderer is unable to provide the references requested by the contracting authority, he may prove his economic and financial capacity by any other means which the contracting authority considers appropriate (evidence of professional risk indemnity insurance, business plan for newly created entities, etc.).

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.

c) Technical and professional capacity

The tenderer must demonstrate convincingly that he has the ability to undertake the tasks requested.

Any tenderer with a professional conflicting interest that may affect the performance of the contract may be rejected on the basis of not fulfilling selection criteria for professional capacity.

- Criterion 1:

Professional experience in similar services: the tenderer must prove his experience in the field of media events and media relations, including web events, with a minimum value for each project of 50.000 €.

As evidence, the tenderer must provide a list of minimum 10, maximum 15 relevant services carried out in the past three years, with the approximate sums, dates and recipients, showing at best his capacity in organising seminars, webinars and online information sessions and MOOCs (massive

open online courses) and in media relations in general and for various audiences.

- Criterion 2:

Necessary human resources to perform the contract in line with best professional practice:

- **One central contract manager**, with at least 5 years relevant experience (project/ account management) which will be appointed as contact point for the Commission. The contract manager needs native-level or equivalent English (C2) and working knowledge of French or German (B2 or above).
- At least **one senior communication strategist**, with at least 3 years proven experience in setting up, managing media relations for large clients. The communication strategist needs native-level or equivalent English knowledge (C2) and working knowledge of French or German (B2 or above).
- At least **two online community managers and online strategists**, with minimum 3 years proven experience in setting up, managing and delivering online and social media outreach activities. They need native-level or equivalent English knowledge (C2). Basic experience in setting up or managing up MOOCs (massive open online courses) or webinars required (at least 6 months).
- At least **two editors**, with 3 years' experience as journalist or equivalent. The editors must be able to draft at native-level proficiency in both English and French. It is acceptable that one of the editors is proficient in English and the other in French.
- At least **two project managers for individual actions**. They need to have proven University-level education or equivalent with specialisation in project management or at least a 2-year proven experience in relevant fields. The project managers must have native-level or equivalent English (C2) and working knowledge of French or German (B2 or above).
- At least **two researchers** charged to identify relevant media and wider audiences, guest speakers a.s.o. They need to have at least 1 year experience in a similar position and native-level or equivalent English and working knowledge of French or German (B2 or above). Any other EU official language is welcome.

As evidence, the tenderer will provide the educational references and professional qualifications of the persons who will provide the services for this tender (CVs), including the management staff. Each CV provided should indicate the intended function in the delivery of the services. All language levels are self-assessed in accordance with the Common European Framework of Reference for Languages².

- Criterion 3 (if applicable):

Necessary technical resources to perform the contract in line with best professional practice:

Possession of, or immediate and complete access to, a complete solution (web platform, maintenance, updates, etc.) for the delivery of online activities and services described in the present specifications.

² <https://europass.cedefop.europa.eu/en/resources/european-language-levels-cefr>

As evidence, the tenderer will provide documents attesting the access to the proposed platform.

8.3.Additional requirements for joint tenders and tenders including subcontracting

Please refer to the Checklist of documents to be provided (see Annex IV to the Invitation to Tender).

Any change in the composition of the group of economic operators during the procurement process (after submission of the offer) is limited to exceptional circumstances (e.g. a take-over) and must be agreed by the Commission.

Any change of subcontractor during the procurement process (after submission of the offer) is subject to agreement by the Commission.

The Commission will require a member of a grouping or a subcontractor to be changed if the member of the grouping or subcontractor proposed is in an exclusion situation or does not meet a specific selection criterion.

9. AWARD CRITERIA

Bids from tenderers who do not satisfy the exclusion or selection criteria will not be considered for the award of the contract.

The contract will be awarded to the tender offering the best value for money.

9.1.Technical evaluation

The technical tender to be submitted as part of the tender (see point 6) will be assessed as follows:

Module 1 and associated case studies

Quality award criterion for the <u>technical offer for Module 1</u>	Explanation of the criterion's scope	Maximum number of points per criterion (weighting)	Minimum points to be obtained (at least 50 % per criterion and 60 in total)
Methodology, timeline and work plan of technical proposal	Relevance and credibility of the general proposed timeline and work plan, work distribution among the team (role and responsibilities of each member of the team), interaction with the ordering service, timetable and delivery arrangements. Quality and relevance in terms of proposed method for logistics organisation (venue, accommodation, catering, transport, insurance, crisis management and cancellation policy). Quality and efficiency of methods of dealing with multinational and multilingual participant groups. Description of the measures in place for the simultaneous delivery of high quality services to several contracting authorities within the agreed deadlines.	20	10
Approach to identifying participants and setting Key Performance Indicators	Relevance, quality and level of details of general criteria, filtering system and method to attract and propose participants and to propose programme and content. Relevance of approach and quality of details for the methodology used to propose objectives and KPIs for actions under Module 1	25	12.5

Follow-up, evaluation and quality of the measures implemented for a continuous high performance throughout the contract period, including quality control measures	Quality of the proposed follow-up to actions under Module 1, especially in what concerns the need to ensure longer-term relationship with the participating media. Quality and relevance of the evaluation system proposed for actions under Module 1. Quality and relevance of the criteria and structure proposed for the implementation report, especially in what concerns methods to gather generated coverage, the level to which the stated objectives were reached and lessons for the future. Quality assurance: measures implemented for a continuous high performance throughout the contract period, including risk assessment, quality control measures The quality control system applied to the service foreseen in these tender specifications concerning the quality of the deliverables and the continuity of the service. The quality system should be detailed and specific to the tasks at hand; a generic quality system will result in a low score.	20	10
Quality award criterion for the <u>case studies under Module 1</u>	Explanation of the criterion's scope	Maximum number of points per criterion (weighting)	Minimum points to be obtained (at least 50 % per criterion and 60 in total)
Timeline and work plan	Relevance and credibility of the proposed timeline and work plan.	15	7.5
Participants and meeting the overall objective of the case studies	Quality and relevance of the proposed participants, justification of the proposed participants, credibility of the method to attract proposed participants and geographical balance. Quality of the explanation on how the proposed solution meets the stated objectives of the case study.	15	7.5
Programme and meeting the overall objective of the case studies	Quality and relevance of the proposed programme and speakers, adequacy of the proposed programme and speakers for the stated objectives of the case study.	15	7.5
Total for Module 1		110	55

Module 2 and associated case studies

Quality award criterion for the <u>technical offer for Module 2</u>	Explanation of the criterion's scope	Maximum number of points per criterion (weighting)	Minimum points to be obtained (at least 50 % per criterion and 60 in total)
Content, Participants, KPIs and follow-up	Relevance of criteria used to propose the course content and speakers and their level of details. Quality of method to target and attract the target media participants relevant for the objectives of the course/webinar. Methods of dealing with a multilingual audience and moderation methodology. Quality of the criteria and indicators used to propose Key Performance Indicators for actions under Module 2. Quality of the proposed follow-up to actions under Module 2, especially in what concerns community building with the participating media.	15	7.5

Timeline, work plan, logistics and quality assurance	Relevance and credibility of the proposed general timeline and work plan, work distribution among the team (role and responsibilities of each member of the team), interaction with the ordering service, timetable and delivery arrangements. Quality and flexibility of the proposed web platform. Quality assurance: measures implemented for a continuous high performance throughout the contract period, including risk assessment, quality control measures, and measures to ensure the follow-up of the normal technological advances in the field and to implement new technological evolution.	15	7.5
Quality award criterion for the <u>case study</u> under <u>Module 2</u>	Explanation of the criterion's scope	Maximum number of points per criterion (weighting)	Minimum points to be obtained (at least 50 % per criterion and 60 in total)
Overall suitability of the proposed solution for the case study under Module 2	Relevance of the timeline and credibility of the work plan. Relevance and balance of the proposed budget. Quality and relevance of the proposed programme and speakers, adequacy of the proposed programme, speakers and trainers for the stated objectives of the case study. Quality of the explanation on how the proposed solution meets the stated objectives of the case study.	20	10
Total for Module 2		50	25

Module 3 and associated case studies

Quality award criterion for the <u>technical offer</u> for <u>Module 3</u>	Explanation of the criterion's scope	Maximum number of points per criterion (weighting)	Minimum points to be obtained (at least 50 % per criterion and 60 in total)
Methodology, timeline and work plan of technical proposal	Relevance and credibility (in terms of deadlines, workload, work distribution, interaction with the ordering service, etc.) of the proposed general timeline and work plan for actions under Module 3.	10	5
Identifying target audiences, KPIs, follow-up and quality assurance	Relevance and quality of the methods used to identify target media and other target groups, especially in terms of the used network, research method, timeline, presentation and level of detail. Quality of the criteria used to propose key performance indicators; quality and level of detail of proposed solution for evaluation; relevance of feedback cycles and their transposition into incremental improvements. Quality assurance: measures implemented for a continuous high performance throughout the contract period, including risk assessment, quality control measures, and measures to ensure the follow-up of the normal technological advances in the field and to implement new technological evolution.	15	7.5
Quality award criterion for the <u>case study</u> under <u>Module 3</u>	Explanation of the criterion's scope	Maximum number of points per criterion (weighting)	Minimum points to be obtained (at least 50 % per criterion and 60 in total)
Overall suitability of the proposed solution for the case study under Module 3	Quality of the explanation of the proposed solution (including relevance and balance of budget) and how it meets the stated objectives of the case study.	15	7.5
Total for Module 3		40	20
OVERALL TOTAL		200	120

The result of the technical evaluation is the sum of the number of points obtained as a result of the evaluation of each criterion. Only those tenders which are awarded at least 50% for each criterion and a total score of at least 120 points will be considered for the award of the contract.

9.2. Financial evaluation

For the financial tender, the tenderer must use the standard price table(s) in Annex V to the Invitation to Tender.

Any omission or amendment to the original price table may cause the bid to be considered null and void. The price table will be submitted both on paper, duly completed, dated and signed, and in electronic format.

For the purpose of evaluation and comparison of the financial offers, the Commission will use a reference price, calculated on the basis of the the prices for the various services that are listed in Table 2 of Annex V to the Invitation to Tender. It will be calculated as follows:

$$2*(listA+listB)+listC+0.5*(listD+listE)+0.1*(listF+listG)+ module2+module3$$

where:

- listA through listG represent the total of prices quoted for each sublist under module 1, calculated as the sum of all entries, moderated as follows:

Management and Interpretation

1*Management and consultation for one half day event - Core tasks, for all group sizes

3*Management and consultation for one day long event - Core tasks, for all group sizes

2*Management and consultation for every additional half a day of event (added to initial half day or day) - Option 5, for all group sizes

2*Management and consultation for every additional day of event (added to initial half day or day) - Option 5, for all group sizes

1* Interpretation services for one day - Option 4, for all group sizes

1*Interpretation services for one half day - Option 4, for all group sizes

Venue

1*Venue for one day - Option 2 for groups under 20 or above 41 participants

3*Venue for one day - Option 2 for groups between 20 and 40

1*Venue for one half day - Option 2 for groups under 20 or above 41 participants

3*Venue for one half day - Option 2 for groups between 20 and 40

1*Supplement for higher standing venue for one day - Option 2, for all group sizes

1*Supplement for higher standing venue for one half day - Option 2, for all group sizes

Logistics, administrative costs and catering

10*Price for logistics and administrative services - Option 1 for groups under 20 participants

20*Price for logistics and administrative services - Option 1 for groups between 20 and 40 participants

25*Price for logistics and administrative services - Option 1 for groups above 41 participants

10* Price for coffee break - Option 3 for groups under 20 participants

20*Price for coffee break - Option 3 for groups between 20 and 40 participants

25*Price for coffee break - Option 3 for groups above 41 participants

10*Price for sit-down buffet - Option 3 for groups under 20 participants

20*Price for sit-down buffet - Option 3 for groups between 20 and 40 participants

25*Price for sit-down buffet - Option 3 for groups above 41 participants

5*Price for seated dinner - Option 3 for groups under 20 participants

10*Price for seated dinner - Option 3 for groups between 20 and 40 participants

12*Price for seated dinner - Option 3 for groups above 41 participants

- module2 represent the total of prices quoted for each service under module 2, calculated as the sum of all entries, moderated as follows:

1* Price for one half day webinar

4* Price for one day long webinar

2* Price for every additional half day of webinar

10* Price for every information module in an structured online information event

5* Price/day for course/webinar management

5* Price/day for development

- module3 represent the total of prices quoted for each service under module 3, calculated as the sum of all entries multiplied by 5:

The reference price calculation will be generated automatically in table 3 of Annex V to the Invitation to tender.

9.3.Award of the contract

The contract will be awarded to the tender achieving the highest score obtained by applying the following formula:

Score for tender X	=	Cheapest Reference Price	* 40	+	total quality score (out of 200) for all criteria of tender X	* 60
		Reference Price of tender X			200	