|  |
| --- |
| **ANNEX 1**  **STANDARD SUBMISSION FORM**  **Communication and events**  **LISA/2014/OP/01**  **Lot 2-Event and travel management**  **Technical Selection and Evaluation** |

Table of Contents

[LOT 2 SELECTION 3](#_Toc382841589)

[Section 4 – Technical Selection (technical and professional capacity) 4](#_Toc382841590)

[4. Technical and Professional capacity LOT 2 4](#_Toc382841591)

[4.1 Suitability of the tenderer’s organisational structure to allow the delivery of the required services 4](#_Toc382841592)

[4.2. Expertise and technical equipment 4](#_Toc382841593)

[4.3 Manpower and qualification of staff relevant to the required services 6](#_Toc382841594)

[Section 5 – Technical Evaluation questionnaire 8](#_Toc382841595)

[5. Evaluation of the offer – Technical evaluation LOT 2 8](#_Toc382841596)

[5.1. Task 1- Organisation of 1 day conference (100 points) 8](#_Toc382841597)

[5.2 Task 2- Organisation of press briefing (100 points) 11](#_Toc382841598)

[5.3 Task 3- Organisation of the post-Conference reception (100 points) 11](#_Toc382841599)

[5.4 Travel management of missions of staff (100 points) 12](#_Toc382841600)

[5.4.1 Quality of the tenderer’s proposal for the overall management of the services (30 points) 12](#_Toc382841601)

[5.4.2 Quality of the tenderer’s proposal for the delivery of the services (50 points) 13](#_Toc382841602)

[5.4.3 Quality of the tenderer’s proposal for availability, handling changes and cancellations (20 points) 14](#_Toc382841603)

[Section 6 – Financial Evaluation Questionnaire 16](#_Toc382841604)

# LOT 2 SELECTION

LISA/2014/OP/01

Name of the tenderer : ……………………………………………………………………………

|  |
| --- |
|  |

Section 4 – Technical Selection (technical and professional capacity)

# Technical and Professional capacity LOT 2

## 4.1 Suitability of the tenderer’s organisational structure to allow the delivery of the required services

***In case of a joint offer, provide the information on behalf of the whole consortium, including subcontractors.***

### Organisation

### Have you enclosed a brief description of the company's business activities relating to the services covered by this tender?

|  |
| --- |
| YES/NO **(mandatory)**  Reference: |

### Have you described your organisational structure, in particular in relation to the services requested in this tender?

#### If relevant, include the relationships between the tenderer and other companies of the same group, including those that could participate (e.g. as sub-contractor) in the delivery of the requested services.

|  |
| --- |
| YES/NO **(mandatory)**  Reference: |

### 4.1.3 Have you enclosed a description of the organisation of your department(s) responsible for the delivery of the requested services with the number of staff involved?

|  |
| --- |
| YES/NO  Reference: |

## Expertise and technical equipment

### 4.2.1 Do you satisfy the criteria (1-5) listed below that supports the expertise for the services required?

Criterion 1

Have expertise in and a minimum of three years' experience of organising conferences/seminars/working group meetings in several countries and several languages (at least 3) including organising invitations, registration, transport, accommodation and meals for participants.

Criterion 2

Have expertise in and a minimum of three years' experience of organising press conferences, media briefings other kinds of events for the press (including drafting press materials) in several countries and several languages (3 at least).

Criterion 3

Have expertise in and a minimum of three years' experience of other kinds of events (competitions, exhibitions, roadshows etc.) in several countries and several languages (3 at least).

Criterion 4

Have expertise in and a minimum of three years' experience of designing, creating and managing multilingual registration websites (in 3 languages at least).

**Criterion 5**

Have minimum 3 years of experience in Business Travel and a good track record in serving international organizations, embassies and medium to large multinational corporations and being accredited as IATA or equivalent travel agent.

|  |
| --- |
| YES/NO (mandatory) |

### Have you enclosed evidence for the criteria (1-5) as requested below?

* A list of the main clients and the main services provided during the last three years, indicating the value, the date and the public or private recipient of these services.
* Examples of services relating to criteria 1 to 3 and produced over the last three years. If those services was partly produced by members of a group (or consortium of companies) or by subcontractors, the tenderer must clearly indicate the role and contribution of everyone involved.

|  |
| --- |
| YES/NO  Reference: |

### Have you provided evidence on the accreditation as travel agent?

|  |
| --- |
| YES/NO (Mandatory)  Reference: |

### Do you satisfy the criterion (6) listed below that supports the expertise for the services required?

**Criterion 6**

Necessary technical equipment to provide the services this call for tenders: facilities of on-line booking/airline reservations, in-plant domestic and international ticketing and ticket printing facilites/satellite ticketing printer (CRS, STP and online booking tool),telephone lines, fax and e-mail, facilities as well as, dedicated computer connections and programs.

|  |
| --- |
| YES/NO (mandatory) |

### 4.2.5 Have you enclosed evidence for the criterion (6) as requested below?

* A list of the material and technical equipment at his disposal for performing the proposed services.

|  |
| --- |
| YES/NO  Reference: |

### 4.2.6 Do you satisfy the criterion (7) listed below that supports the expertise for the services required?

**Criterion 7**

Have the linguistic skills needed to perform the proposed services in all the official languages of the European Union and of the EFTA/EEA countries, the candidate countries and, possibly, other countries.

|  |
| --- |
| YES/NO (mandatory) |

### 4.2.7 Have you enclosed evidence for the criterion (7) as requested below?

The tenderer must demonstrate his ability to work in the most common EU languages and, if necessary, his ability rapidly to mobilise the resources necessary to perform the proposed services in all the official languages of the European Union and of the EFTA/EEA countries, the candidate countries and, possibly, other countries. In order to demonstrate this ability, he must supply examples of work already produced in languages other than his own.

## Manpower and qualification of staff relevant to the required services

The tenders are required to provide a detailed description of the human resources available to perform the contract, and in particular:

1. a statement of the average annual manpower and the number of managerial staff over the last three years;
2. a list of permanent and temporary staff;
3. the educational and professional qualifications of project leaders, who should have the following skills, to be evidenced by testimonials/references (at least three CVs should be provided. CV should be in the format presented at [http://europass.cedefop.europa.eu/](http://europass.cedefop.europa.eu/en/home) ):
4. the required level of education considered relevant in the field covered by the contract (minimum post-secondary level);
5. a minimum of 5 years’ experience in the field covered by the contract;
6. knowledge of the European Union and of its institutions;
7. perfect command of the working language of the Agency (English), indicating knowledge and level of other official languages of the European Union;

***In case of a joint offer, the required information should be provided for the tenderer as a whole.***

*Staff of subcontractors is indicated separately.*

Please note that **only staff with a direct, individual and regular employment contract with the tenderer can be quoted as "tenderer's staff"**. **The figures related to freelancers and the staff of other (corporate) subcontractors declared in the list of subcontractors in the tender form have to be indicated separately.**

a) In case of a consortium, the thresholds mentioned below will apply on the level of the consortium and not on an individual basis (including subcontractor's staff).

b) The tenderer's number of staff has to be indicated on the date of preparation of the offer, and the subcontractors staff and the total staff (exact sum of tenderer's staff and subcontractors staff) as well. The thresholds apply on the total.

c) In case of a branch-company responds in the name of a group, a written endorsement of the group is necessary with the names of all affiliated companies that participate effectively.

d)Staff without an employment contractual relation to a company (e.g. freelancers or staff from other subcontractors) may only be quoted as subcontractor staff. Only declared freelancers or subcontractors can be counted.

### 4.3.1 Have you enclosed the requested documents?

|  |
| --- |
| YES/NO  Reference: |

Section 5 – Technical Evaluation questionnaire

# Evaluation of the offer – Technical evaluation LOT 2

The tenderers shall provide for each of the following 3 Tasks detailed case studies based on the requirements described in Section 2.1.2 of the Tender Specifications.

To enable the Agency to assess his bid, the tenderer must, for each of the tasks case study for Lot 2:

* describe in detail how he plans to carry out the prescribed tasks, carefully specifying the organisational arrangements and the various stages of the work, estimating how long they will take and identifying the most important points;
* describe the methods that he intends to use to ensure that the work is of a high quality and done on time, whether it is carried out by himself, by subcontractors or by other members of the consortium;
* where appropriate, describe the methods that he intends to use to organise and monitor to the best of his ability the work of subcontractors or other members of the consortium;
* describe the methods that he intends to use to enable him to work on a regular basis in countries other than his own and in languages other than his mother tongue, in particular describe how/if he intends to work with a partner network;
* describe the methods that he intends to use to work as closely as possible with the eu-LISA staff in Tallinn, Strasbourg and Brussels.

The case studies will be evaluated based on the Section 3.4 of the Tender Specifications. Only tenders that have obtained at least 70/100 for each case study will be considered for the next stage, which consists in calculating the financial value of the tenders (sum of the prices of all case study tasks) and then determining which offers the best value for money.

**Tasks 1-3**

eu-LISA will roll out a new IT system which will automate and facilitate the control of identification documents when entering in Schengen Area. The Agency developed the system and it will be in charge of its management.

On the occasion of the roll-out eu-LISA is organising a high-level Conference.

The one-day conference will bring together prominent delegates from European Union (EU) Institutions, national governments of EU Member States, corporate and non-governmental organisations as well as the press and media.

The Conference will take place on 23 October 2014 in Strasbourg, France.

In occasion of the conference, the contractor will need to organize a press briefing and an evening reception that will be further detailed in the following tasks.

## Task 1- Organisation of 1 day conference (100 points)

Details of the Conference

* Date: 23 October 2014
* Duration: 1 day from 08:30 to 16:30 (local time)
* Place: Strasbourg, France
* Venue: city-centrally located (capacity for maximum 120 people) with technical means for presentations, interpretation and all necessary services.
* Speakers/Moderator/Panellists: 8
* Participants: 100 participants including 8 Speakers/Moderators/Panellists. They will come from London (3), Paris (2), Tallinn (1) and Rome (2). 8 participants will be representatives from European Union Institutions and they will be based in Brussels. 28 will be journalists, one from each Member States of European Union and the remaining participants (56) will be two per each Member States. The total number of participants (100) excludes eu-LISA staff members which will organize their travel and accommodation independently.

DETAILS OF THE SERVICES REQUIRED

* The contractor will identify participants (within defined target groups like European Union (EU) Institutions, national governments of EU Member States, corporate and non-governmental organisations as well as the press and media etc.).
* The contractor will be required to contact potential participants via email and deal with enrolments (registration, confirmation, etc.). A registration website needs to be created to enable the participants to register and get practical information.
* The contractor will be required to organise transport for participants from each national capital to Strasbourg, as well as accommodation and meals.
* eu-LISA will identify and contact Speakers/Moderators/Panellists itself regarding their participation in principle. They will then be contacted regarding the technical aspects of their travel arrangements by the contractor, who will organise their travel and accommodation in the same way as for the other participants.
* Arrival of participants is expected on the evening of 22 October 2014 and departure on the morning of 24 October 2014 (two nights, two breakfasts, two evening meals, a buffet lunch, two coffee breaks).
* Accommodation should be in a 4-star hotel.
* Buffet lunch and coffee breaks will take place at the venue of the Conference. One evening meal will be the evening reception following the conference (as detailed in Task 3) and will not be part of this Task.
* The contractor will have to provide an estimate of the travel and subsistence expenses of the 100 participants[[1]](#footnote-1). These expenses will be met by eu-LISA (including the transfer from and to the airport or train station).
* The contractor will be responsible for booking and purchasing train/air tickets for the participants and for having the tickets delivered to them (physically or electronically).
* The contractor will be responsible for booking and paying for all participants' hotel rooms.
* The contractor will be responsible for renting of the venue, and for the organisations and payments of all necessary services and all the meals.
* The languages spoken at the conference will be English, with interpretation into and out of French.
* The contractor must produce a full transcription, i.e. verbatim, of what is said by the participants and speakers during the conference. He must provide the Agency with a full transcription in English no later than four weeks after the conference. Once it has been approved by the Agency, the Contractor will prepare a Report in English which will summarise the presentations and debates and which is meant for publication and dissemination. The contractor won't be responsible of the graphic layout and artwork.
* The conference will be held in a room large enough for 120 people, with a reception area, a small additional room reserved for the organisers, and a relaxation area for coffee breaks and buffet lunch.
* The minimum equipment for the conference room is: a full sound system, a rostrum with 4 microphones, two wireless microphones, 2 interpreting booths, 120 headsets, a PC with PowerPoint and Internet connection, high-speed Internet access, high-resolution video projector, overhead projector, flipchart, large screen (+/- 3.50 x 2.50 m), decorative items (flags, flowers, plants, etc.) and 8 name tags, one for each speaker.
* The contractor will be responsible for the organization of 2 Coffee breaks: one mid-morning (coffee, tea, water, juice, fruit, biscuits and pastries) and one in the afternoon (coffee, tea, water, fruit, juice, biscuits).
* The contractor will be responsible for the organization of 1 light and healthy buffet lunch which will have to include water, juice, soft drinks and coffee and tea.
* The equipment needed for the organisers' room, reception area and relaxation area is to be specified by the contractor.
* The contractor will also need to provide with web-streaming of the conference (one-camera), video and audio recording
* A professional photographer shall be available during the conference to provide high-quality pictures.
* The contractor must design a programme and post it on the event website. Participants should be sent the programme by email in English.
* Each participant and speaker must receive: a four colour printed badge. The participants will also receive a standard conference kit including 1cotton bag, lanyard for the badge, 1 plastic pen and paper folder. In the folder there should be 1 four colour printed A4 writing pad, the list of participants and speakers, the programme, a basic 30-page content document. The contractor will design and produce all these elements (the 30-page document will be delivered by eu-LISA and only be printed by the contractor in color).
* The contractor will design, produce and install A3 signposts in English and in four colour: 2 for the registration desk, 2 for the meeting room, 2 for the coffee breaks and 2 for the lunch buffet.
* The contractor will design 1 digital backdrop.
* The contractor must ensure that a technician is present for the entire duration of the conference.
* The contractor must ensure that four host/hostess fluently speaking English and French are present for the entire duration of the conference. The will welcome the participants, take care of the registration and distribution of conference kits. They will also assist them during all duration of the conference.
* The contractor must ensure that two of his representatives are present from the morning of 22 October until the morning of 24 October 2014. They will be responsible to solve any problem related to the organisation of the event (technical issues, logistics, travelling and accommodation…).

Tenderers must:

* describe in detail the methodology they will use for organizing the reception and all the type of services they will propose;
* submit a detailed and concrete proposal covering all aspects of the organisation of the task;

### 5.1.1. Have you provided the case study for task 1?

|  |
| --- |
| YES/NO (mandatory)  Reference: ………. |

## 5.2 Task 2- Organisation of press briefing (100 points)

In the framework of the conference (Task 1) the contractor is responsible for the rental, fit-out and payment for the period of 1.5 hour of a separate venue for a press-briefing to be carried out in parallel of the Conference. The venue should be a walking-distance from the main conference room (Task 1).

The press-briefing room fit-out should include: a table 4 chairs for speakers and 28 chairs for journalists, bottled water and glasses for the speakers, a full sound system, a rostrum with 4 table microphones and one radio microphone, 2 interpreting booths, enough headsets for speakers and journalists, a PC with PowerPoint and Internet connection, high-speed Internet access, high-resolution video projector, overhead projector, flipchart, large screen (+/- 3.50 x 2.50 m), decorative items (flags, flowers, plants, etc.) and 4 name tags, one for each speaker.

The contractor is responsible for the registration of the journalists and on-site assistance for speakers and journalists. The languages spoken at the conference will be English, with interpretation into and out of French to be provided.

The contractor will be also responsible for the drafting (using information they gathered themselves and approved by eu-LISA) and production of press kits (1 press release, short summary of the profiles of speakers, 1 Background note of 2 pages on the subject of the conference). A complete press kit will be distributed to each participant and speaker. The material will be printed in black and white by the Contractor.

The contractor is responsible of the media monitoring and analysis of the press coverage generated by the event, as well as recommendations and rebuttals

NB: For this task the contractor is not requested to organize travelling and accommodation.

Tenderers must:

* describe in detail the methodology they will use for organizing the reception and all the type of services they will propose;
* submit a detailed and concrete proposal covering all aspects of the organisation of the task.

### 5.2.1 Have you provided the case study for Task 2?

|  |
| --- |
| YES/NO (mandatory)  Reference: ………. |

## 5.3 Task 3- Organisation of the post-Conference reception (100 points)

On the same day of the conference (Task 1) the Contractor is responsible for the rental, fit-out and payment of a venue for a three hours reception which will take place from 19:00 to 22:00. The venue should suitable for the level and nature of the event and should accommodate a maximum up to 120 participants. The fit-out of the reception venue should include:

* set-up for buffet-style catering for 120 participants
* room decorations (flower sets, led lights….)
* technical equipment for speakers (up to maximum 3) and background music (performed by 3 live musicians).

The reception should take place in another venue than the one for the conference. It should centrally located and possibly at walking-distance from the hotel(s) of participants (Task 1).

Account should be taken of people with special dietary needs. The menu will include aperitifs and wine, cold and warm buffet dishes; pastries and fruit. Coffee shall be served after the meal.

A professional photographer shall be available during the reception to provide high-quality pictures.

NB: For this task the contractor is not requested to organize travelling and accommodation.

Tenderers must:

* describe in detail the methodology they will use for organizing the reception and all the type of services they will propose;
* submit a detailed and concrete proposal covering all aspects of the organisation of the task;

### 5.3.1 Have you provided the case study for Task 3?

|  |
| --- |
| YES/NO (mandatory)  Reference: ………. |

## 5.4 Travel management of missions of staff (100 points)

## 5.4.1 Quality of the tenderer’s proposal for the overall management of the services (30 points)

### 5.4.1.1 How do you propose to find qualified and proactive travel consultant, who will deal permanently with our orders in order to be in a position to provide the best services to EU-LISA? (10 points)

|  |
| --- |
| Reference: ………. |

### 5.4.1.2 Describe in case of unavailability of the regular travel consultant how you will manage the replacement with relevant handover (10 points)

|  |
| --- |
| Reference: ………. |

### 5.4.1.3 Describe your risk analysis related to the contract execution (10 points)

|  |
| --- |
| Reference: ………. |

## 5.4.2 Quality of the tenderer’s proposal for the delivery of the services (50 points)

### 5.4.2.1 Describe how you will ensure the timely reply to our requests? (8 points)

|  |
| --- |
| Reference: ………. |

### 5.4.2.2 Describe how will you be able to reserve and issue tickets for air, rail and boat travel, as requested, at the best possible price (combining the most direct and least expensive routes to achieve cost effectiveness) (10 points)

|  |
| --- |
| Reference: ………. |

### 5.4.2.3 Describe how you will propose the participant suitable hotels within the limits allowed (Annex 3: Guide to Missions) taking into account convenience (proximity to the mission venue) (8 points)

|  |
| --- |
| Reference: ………. |

### 5.4.2.4 Describe how you will prepare for each participant, a comprehensive file (electronically) including the following minimum information)(8 points):

* Flight or other type of transport reservation (e-ticket or paper ticket);
* Hotel voucher (where applicable) and map of location of the hotel;
* Information regarding online check-in (if applicable);
* Information on public transport at the airport of the destination

|  |
| --- |
| Reference: ………. |

### 5.4.2.5 Do you have at your disposal a broad selection of car rental companies across Europe, including car rental companies applying special prices to the European Union servants? The current list of such companies will be communicated to the winning tender. (8 points)

|  |
| --- |
| YES/NO  Reference: ………. |

### 5.4.2.6 Describe the geographical coverage of your services (8 points)

|  |
| --- |
| Reference: ………. |

### 5.4.2.7 Are you willing to provide access to the Agency to your booking systems?

|  |
| --- |
| YES/NO  Reference: ………. |

## 5.4.3 Quality of the tenderer’s proposal for availability, handling changes and cancellations (20 points)

### 5.4.3.1 Do you commit to provide services, including delivery of tickets and vouchers during normal working hours (Monday to Friday 9.00 – 17.30) within 4 hours?

|  |
| --- |
| YES/NO (mandatory)  Reference: ………. |

### 5.4.3.2 Do you commit to provide services, including delivery of tickets and vouchers in exceptional cases upon request within 1 hour on normal working days?

|  |
| --- |
| YES/NO (mandatory)  Reference: ………. |

### 5.4.3.3 Do you commit to provide services, including delivery of tickets and vouchers in exceptional cases upon request outside normal working hours?

|  |
| --- |
| YES/NO (mandatory)  Reference: ………. |

### 5.4.3.4 Describe your terms and conditions regarding changes to reservations and Modification/cancellation policy (20 points)

|  |
| --- |
| Reference: ………. |

Section 6 – Financial Evaluation Questionnaire

The tenderers shall provide a detailed budget per task in a form similar to the Price list per elements unit price and number of units. The tenderers shall also fill in the price lists in the attachment of this document. Please note that the prices provided will be obligatory for the contract implementation.

Please also note that the elements of the detailed budget of the case studies shall be in line with the prices provided in the price list.

### 6.1 Have you provided detailed budgets for the 3 case studies?

|  |
| --- |
| YES/NO (mandatory)  Reference: ………. |

### 6.2 Have you filled in the attached financial evaluation sheet for task 4?

|  |
| --- |
| YES/NO (mandatory)  Reference: ………. |

### 6.3 Have you filled in and provided the Price list in attachment?

|  |
| --- |
| YES/NO (mandatory)  Reference: ………. |

1. All the french representatives partcipating at the Conference are based in Paris. National travel and hotel expenses should be organized. [↑](#footnote-ref-1)