|  |
| --- |
| **ANNEX 1**  **STANDARD SUBMISSION FORM**  **Communication and events**  **LISA/2014/OP/01**  **Lot 1- Integrated Communication Services**  **Technical Selection and Evaluation** |

Table of Contents

[LOT 1 SELECTION 3](#_Toc383002501)

[Section 4 – Technical Selection (technical and professional capacity) 4](#_Toc383002502)

[4. Technical and Professional capacity LOT 1 4](#_Toc383002503)

[4.1 Suitability of the tenderer’s organisational structure to allow the delivery of the required services 4](#_Toc383002504)

[4.2 Expertise and technical equipment 4](#_Toc383002505)

[4.3. Manpower and qualification of staff relevant to the required services 6](#_Toc383002506)

[SECTION 5 – Technical Evaluation questionnaire 8](#_Toc383002507)

[5. Evaluation of the offer – Technical evaluation LOT 1 8](#_Toc383002508)

[5.1 Task 1- Strategy and Campaign development (100 points) 8](#_Toc383002509)

[5.2 Task 2 - Poster (100 points) 9](#_Toc383002510)

[5.3 Task 3- Video (100 points) 9](#_Toc383002511)

[5.4 Task 4 - Factsheet (100 points) 10](#_Toc383002512)

[5.5 Task 5 Social Media Campaign (100 points) 10](#_Toc383002513)

[Section 6 – Financial Evaluation Questionnaire 11](#_Toc383002514)

# LOT 1 SELECTION

LISA/2014/OP/01

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

|  |
| --- |
|  |

Section 4 – Technical Selection (technical and professional capacity)

# Technical and Professional capacity LOT 1

## 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

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

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

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

#### *4.1.3 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: |

#### *4.1.4 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: |

## 

## 4.2 Expertise and technical equipment

*4.2.1 Do you satisfy the criteria (1-4) listed below that supports the expertise for the services required?*

Criterion 1

Have expertise in and a minimum of three years' experience of managing transnational and multilingual information and communication projects, including integrated campaigns, social media campaigns and media relations.

Criterion 2

Have expertise in and a minimum of three years' experience in creating (drafting, adapting, translating, designing and laying out) information products, multimedia design and promotional material in several languages (at least 3) aimed at several countries.

Criterion 3

Have expertise in and a minimum of three years' experience in the production of audiovisual products in several languages (at least 3).

Criterion 4

Have expertise in and a minimum of three years' experience in the design, creation (editorial and graphics content) and management of websites in several languages (at least 3).

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

#### *4.2.2 Have you enclosed evidence for the criteria (1-4) 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 work relating to criteria 1 to 3 and produced over the last three years. If this work 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. The projects referred to must include the name of a contact person who can, if necessary, vouch for the existence of the services.

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

#### *4.2.3 Do you satisfy the criterion (5) listed below that supports the expertise for the services required?*

Criterion 5

Have the necessary material and technical equipment to perform the requested services described in Section 2.1.1 of the Tender Specifications.

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

#### *4.2.4 Have you enclosed evidence for the criterion (5) as requested below?*

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

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

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

Criterion 6

Have the linguistic skills needed to perform the requested 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) |

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

The tenderer must demonstrate his ability to work in the languages of the European Union and, if necessary, his ability to rapidly 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 the 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 1

The tenderers shall provide for each of the following 5 Tasks detailed case studies based on the requirements described in Section 2.1.1 of the Tender Specifications.

To enable the Agency to assess his bid, the tenderer must, for each of the tasks case study for Lot 1:

* carry out the work requested in accordance with the specifications;
* 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 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.

## 5.1 Task 1- Strategy and Campaign development (100 points)

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.

The Agency wants to launch an integrated communication campaign (running for a period of approximately 8 weeks) on the new IT system. The overall budget of the campaign is euro 500,000.

The objective of the campaign is to raise awareness about the innovation of the system, how this will impact on security for all EU citizens and how it will facilitate the work of law enforcement authorities in Member States.

In this task, the role of the contractor is to:

* Define the segments of the target audience
* Define the key message
* Define the strategy of the campaign specifying the communication tools and media to be used (including details on concrete channels/websites etc.), the schedule and the budget distribution and estimate possible results. The communication tool mix needs to include at least (but not exclusively) the elements that will be further developed in the following tasks (a poster, a video, a factsheet and a social media campaign).

For policy information on all tasks in this case study, the documentation presented on the website of the Agency can be consulted on <http://eulisa.europa.eu> .

.

### 5.1.1 Have you provided the case study for Task 1?

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

## 5.2 Task 2 - Poster (100 points)

A poster is to be developed as one of the communication tools in the framework of the above-mentioned Campaign (Task 1). The tenderer is asked to:

* Create a concept and design the poster (A3 format) which will be suitable for all the target audiences of the campaign;
* Prepare the text of the poster including images and/or illustrations in EN using information they have gathered themselves.

One mock-up of the poster in English should be included in each copy of the reply to the tender.

For the purpose of the exercise, the tenderers do not need to follow the visual identity of the Agency when executing the tasks set in this case study. They only have the obligation to include the official logo of the Agency.

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

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

## 5.3 Task 3- Video (100 points)

In the framework of the integrated Campaign (Task 1), eu-LISA has also decided to produce a video.

The tender should:

* Present a scenario for the video with maximum length of maximum 2 minutes. The tenderers will write the scenario based on information they have gathered themselves;
* The video should be conceived in a way that dubbing and voiceover are not required in order to reduce to the minimum the costs of translations and adaptation. The language of possible graphics elements will be English.
* Explain in detail how the production would be approached including a timeline.

For the purpose of the exercise, the tenderers do not need to follow the visual identity of the Agency when executing the tasks set in this case study. They only have the obligation to include the official logo of the Agency.

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

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

## 5.4 Task 4 - Factsheet (100 points)

eu-LISA needs to produce a factsheet gathering in a simple and understandable form all important information on the subject of the Campaign (Task 1).

The length of the factsheet should be two laid out A4 pages maximum.

The tenderers should:

* Create a concept and design the factsheet which will be suitable for all the target audiences of the campaign;
* Prepare the text of the factsheet in EN using information they have gathered themselves;
* Prepare a layout for the factsheet including images and illustrations the tenderers have gathered themselves;
* Prepare infographics on the data they have gathered themselves;

One copy of mock-up of the factsheet in EN should be included in each copy of the reply to the tender.

For the purpose of the exercise, the tenderers do not need to follow the visual identity of the Agency when executing the tasks set in this case study. They only have the obligation to include the official logo of the Agency.

### 5.4.1 Have you provided the case study for Task 4?

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

## 5.5 Task 5 Social Media Campaign (100 points)

As part of the integrated Campaign (Task 1), the contractor should design a Social Media Campaign on Facebook and Twitter.

The tenderer should:

* Define the target audience for the Social Media Campaign to be undertaken in all Member States of the EU;
* Define the tools to be used to best reach this audience;
* Prepare at least 5 texts (in EN) to be used on Social Media accounts using information they have gathered themselves;
* Propose at least 1 graphic layout for the account pages;
* Present a timeline/planning for the campaign;
* Estimate results of the proposed campaign (e.g. number of website visits, no or re-

tweet etc.).

### 5.5.1 Have you provided the case study for Task 5?

|  |
| --- |
| YES/NO (mandatory)  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 Lot 1 special budgetary restrictions**

Task 2

In addition to the elements described in Section 5.2 the tenderers should propose a detailed budget which must cover the production of the poster (including translation, typesetting and any other necessary service) into 5 additional official languages of the EU (FR, ET, DE, IT and RO), printing (in four colours and A3 format; paper 135g/m2), packaging and delivery of the following numbers of copies to the headquarters of the Agency in Tallinn (EE) and to its operational site in Strasbourg (FR):

* To Tallinn: 100 copies for each language: EN, FR, ET, DE, IT and RO (Total: 600 copies)
* To Strasbourg: 100 copies for each language: EN, FR, DE (Total: 300 copies).

**Task 3**

In addition to the elements described in Section 5.3 the tenderers should propose a detailed budget which must cover the necessary services for the production (translation, typesetting, editing …) of the video proposed into 5 additional official languages of the EU (FR, ET, DE, IT and RO).

Task 4

In addition to the elements described in Section 5.4 the tenderers should propose a detailed budget which must cover the production of the factsheet (including translation, typesetting and any other necessary service) into 5 additional official languages of the EU (FR, ET, DE, IT and RO), printing (in four colours and A4 format; paper 135g/m2), packaging and delivery of the following numbers of copies to the headquarters of the Agency in Tallinn (EE) and to its operational site in Strasbourg (FR):

* To Tallinn: 300 copies for each language: EN, FR, ET, DE, IT and RO (Total: 1800 copies)
* To Strasbourg: 100 copies for each language: EN, FR, DE (Total: 300 copies).

### 6.1.1. Have you provided detailed budgets for the 5 case studies?

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

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

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