20 September 2013

Communications Team

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| Open Tender for Communication Consultancy and Support |
| Tender Specifications |
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Tender for Communication Consultancy and Support

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1. **Background**

*About the EBA*

The European Banking Authority (EBA) is one of the three European Supervisory Authorities (ESAs) that together with the European Systemic Risk Board (ESRB) make up the new European architecture for financial supervision created in response to the financial crisis that hit the world in 2008. Together with the national supervisory authorities, the ESAs, the EBA’s Joint Committee and the ESRB represent the new European System of Financial Supervision (ESFS). The EBA officially came into being on 1 January 2011. The EBA has its headquarters and only office in London. As of the second half of 2013, the EBA was composed of around 108 staff members, including experts seconded from national authorities. The organisational chart can be found on the EBA website: <http://www.eba.europa.eu/about-us/organisation/organisation-chart>

*Objectives*

The EBA’s objective is to safeguard public values such as the stability of the EU financial system, the transparency of markets and financial products, and the protection of depositors and investors in the EU. To do so, it works closely with a network comprising EU and national bodies (national authorities in charge of banking supervision, central banks, other ESAs, etc.).

*Tasks*

The EBA has a broad remit, which includes preventing regulatory arbitrage, guaranteeing a level playing field, strengthening international supervisory coordination, promoting supervisory convergence and providing advice to EU institutions in the areas of banking, payments and e-money regulation, as well as on issues related to corporate governance, auditing and financial reporting.

The tasks set out in the EBA’s mandate include, among others:

* Developing draft regulatory and implementing technical standards on EU banking legislation aimed at establishing a set of harmonised rules, the so-called ‘Single Rulebook’;
* Issuing guidelines and recommendations to both the competent authorities and financial institutions aimed at establishing consistent, efficient and effective supervisory practices within the ESFS;
* Investigating alleged incorrect or insufficient application of EU law by national authorities and issuing recommendations in specific cases where a competent authority is in breach of EU law;
* Taking decisions directed at individual competent authorities or financial institutions in emergency situations;
* Mediating or issuing binding determinations to resolve disagreements between competent authorities in cross-border situations;
* Issuing decisions addressed to individual financial institutions in exceptional circumstances if EU law is directly applicable and the competent authorities have persistently failed to act;
* Acting as an independent advisory body and issuing opinions to the European Parliament, the Council or the Commission;
* Ensuring proper follow-up of warnings and recommendations issued by the ESRB;
* Taking a leading role in promoting transparency, simplicity and fairness in the market for consumer financial products or services across the internal market.

*Communications Team and activities*

The Communications Team at the EBA is composed of two communications officers and one assistant. The Team is in charge of defining and implementing all external and internal communication activities. Just to mention a few examples, these include: media relations (proactive and reactive), web and events management, production of promotional material, management of information requests, participation in external meetings, managing attendance to seminars, etc.

Some recent and specific communication projects are also worth mentioning: a new version of the EBA’s website featuring a complete redesign was launched; also, the creation of a visual identity style guide for all publication and communication products of the EBA was carried out.

*Target audiences*

The communication target audiences shall be specified and detailed further at a later stage and may change in accordance with the specific objectives and/or the nature of other initiatives. As an indication, the main target audiences shall be defined around media (specialised and general), banking and financial stakeholders (industry, analysts, academia, consumer representatives, NGOs etc.), European, national and international authorities, decision makers/opinion leaders in the banking sector.

It is worth reminding that as a European Union institution, the EBA addresses audiences from 28 EU Member States. This, therefore, requires that all its communication activities are not only carefully adapted to a specific type of audience, but also take into consideration the extent of national and regional varieties in the EU, as well as the overall functioning of the EU institutions both in relation to each other and in relation to national authorities at Member State level.

1. **Objective of the Contract**

The objective of the requested service is to support the definition and implementation of the EBA’s communication strategy in an efficient manner. The Consultant will also be expected to provide input and assistance to the EBA on specific and ad-hoc communication, and information dissemination projects and activities in line with the aforementioned communications strategy.

As an example, projects will cover communications stunts, promotional projects, media relations activities, web and audio-visual projects and products, as well as any other communication and information initiatives, beyond those listed in these Tender Specifications and that either the EBA Communications Team or the Consultant may deem appropriate or necessary. The Consultant will be expected to provide advice reactively based on specific requests from the EBA Communications Team and/or proactively where the Consultant identifies gaps or opportunities in communication activities.

The tasks will be carried out in close consultation with the EBA communication team; the Consultant will ensure that all the activities listed in these Tender Specifications, as well as any other activity related to the scope of the contract, are conceived and deployed in an efficient and timely manner.

Other communication projects that already are the object of other contracts will not fall under the scope of this contract. This is the case for instance for translation and editing services, the conception and production of certain types of regular publications (i.e. annual report), as well as hosting and service operations for the website and other ad-hoc web related projects.

* 1. Project Description

These Tender Specifications cover the whole range of aspects related to the conception and definition of a communication strategy, as well as its full implementation. These Tender Specifications therefore cover a wide range of activities from general communication and media activities to the design and production of communication material to the definition of working plans, as well as different types of events, for which support would be expected both in terms of strategic approach and in terms of organisation and logistics. The number and/or nature of services and/or products required is intended to be on-going and does not need to be specified in detail at this stage of invitation to tender. The task lists give an indication of almost all the work that the Consultant will be required to carry out. However, these lists should not be considered as exhaustive and the EBA will be able to ask the Consultant to carry out any other tasks that fall within the scope and subject matter of the contract.

* 1. Contract Performance Places

The activities carried out under this contract may take place at the Consultant premises or in London where the EBA is based or wherever else required, depending on the nature of the tasks involved.

For some of the requested services, especially those regarding media relations, the Consultant will have to be capable of proposing strategies to reach audiences beyond Europe. This will be required on an occasional basis and most likely concerning regions in Northern America and Asia for instance. In this respect, the Consultant will be asked in the evaluation procedure to give proof of capacity, experience and contacts to deploy communication and media strategies in these regions.

1. **Description of Tasks to be carried out by the Consultant**
	1. General Communication Consultancy: Communications Strategy

The Consultant may be required to provide advice and support in the definition and implementation of a communication strategy for the EBA, planning consequent activities, selecting appropriate on-going and ad-hoc communication/dissemination tools, as well as setting up monitoring plans aimed at assessing the impact and effectiveness of the communication activities.

The advice and support provided by the Consultant should take into consideration the technical nature of the EBA’s tasks in particular in relation to banking regulation and supervision in the EU.

The aim of the EBA communication strategy will be to support and facilitate the work of the EBA on all tasks related to its mandate. The strategy will focus on two main aspects, one related to information purposes and the other related to promotional purposes:

1. **Informing the EBA Stakeholders (SHs):** this aspect of the communication strategy will ensure that all relevant information is passed on to the EBA’s stakeholders in a correct, timely, exhaustive and efficient manner.
2. **Increasing awareness of and correctly positioning the EBA and its work:** this aspect of the communication strategy will ensure that:
	1. Communications reach out to all relevant communication audiences and therefore increase the visibility of the EBA and its work;
	2. Communications help create a correct and positive perception and understanding of the EBA and its work among relevant target audiences.
		1. Overall and Ad-Hoc Strategies, Working Plans, Monitoring and Reporting

As part of this framework contract, the Consultant will be asked to perform the following tasks:

* Advise, support and define with the EBA Communications Team the **overall external communication strategy**, which will run on an annual basis (rolling) and with a view to ensuring maximum efficiency for the two main purposes listed above, i.e. informing Stakeholders (SHs) and communicating the work and remit of the EBA. The strategy will have to be exhaustive and cover in detail all aspects: from the definition of measurable objectives and target audiences, to the definition of approaches and activities that would efficiently allow reaching the objectives. Some examples of expected actions are available under point 3.1.3.
* Advise and support on the definition of **ad-hoc communication initiatives** to promote specific initiatives or projects of the EBA (these could be - to mention a few, the banking stress tests, the EBA’s overall work in the building up of the EU Single Rulebook, etc.), but also to address specific image/perception issues. Note that ad-hoc communication plans may be global or targeted to one or more specific countries.
* Assist and advise the Communications Team in the definition of the **working-plans** deriving from the communication strategy and ad-hoc communication initiatives.
* Advise on the implementation of a **monitoring plan** aimed at assessing the effectiveness and outcome of communication activities.
* Provide relevant **reports** (as an indication on a quarterly basis, but these may also be requested on an ad-hoc basis on some projects) based on the above mentioned monitoring plan; the aim of these reports will be to describe analytically the achievements and results of the communication activities carried out.
	+ 1. Examples of Expected Activities in Working Plans

In relation to informing the EBA stakeholders (SHs):

* Definition and mapping of key SHs;
* Understanding expectations and needs of SHs;
* Identification and recommendations on most appropriate channels for informing and reaching-out to SHs.

In relation to communications activities (awareness and positioning):

* Definition and mapping of target communication audiences;
* Definition of communication objectives;
* Definition of communication key messages;
* Recommendations on the most appropriate communication mix for each objective;
* Identification of the most appropriate channels/tools to address target audiences;
* Definition of yearly and ad-hoc working plans.
	1. Media Relations Activities

Media relations will cover a relevant part of the EBA communication strategy.

The media concerned will mainly be (but not only) specialised in economic, financial and banking issues. However, depending on specific and changing needs, general public and/or other specialised media may also play an important role in the communication activities of the EBA. The Consultant will be expected to have consolidated experience in managing media relations, with exposure to and capacity to deal with a broad range of different types of media across the EU and beyond.

* + 1. Media Strategy

The Consultant may be asked to provide advice and support in the definition of an overall strategic approach to media relations, as well as a specific plan of activities and projects aimed at the media.

This may imply the following tasks (non-exhaustive list):

* Assistance in the definition of a media strategy (define objectives, key messages, target audiences, target media, draft media activities plan, etc.) and ad-hoc media relations stunts;
* Assistance with the conception and preparation of press material: draft, edit and correct texts for media relations purposes, such as press releases, Q&As, background notes, etc.
* Creation, compilation and management (through regular updates) of lists of media contacts in specific fields and areas (such as building up lists of European journalists following specific themes/issues, i.e. consumer protection in financial services);
* Proactive research for coverage opportunities:
* Keeping track of editorial plans of key target media to identify upcoming topics in advance;
* Contacting journalists for discussing interests and exploring coverage opportunities;
* Pitching news and events.
* Support with the preparation of press events and specific media activities:
* Identifying key journalists;
* Organising background sessions, bilateral meetings with key journalists/editors;
* Organising media seminars;
* Dealing with logistics, press invitations, catering, venue selection, etc.
* Provide press reviews, round-ups of coverage and analytical reports to illustrate outcome of media stunts and assess the overall impact of strategic approach to media activities.
	+ 1. Media Training

The Consultant may be asked to provide media training opportunities for the EBA management and staff. As an indication, the Consultant would be expected to provide training opportunities twice a year in London in the form of either one-to-one or small group sessions.

The media training would focus on:

* Introduction to media and media functioning for non-media experts;
* How to behave with journalists/during interviews (print and broadcast media);
* Speaking in public;
* Using clear and concise language;
* Interview techniques;
* Bridging gaps/tackling difficult questions;
* Attending debates/round tables;
* Effectively conveying key communication messages.
	1. Specific Consultancy on Crisis Communications

The EBA will need to go through crisis scenario exercises aimed at anticipating and planning communications actions in case of a crisis related to the fields of activity of the EBA. The ultimate goal of this exercise (likely to be held once a year) will be to investigate strengths and weaknesses in case of a crisis, so that realistic guidelines, best practices and action plans could be defined. The work may also be coordinated with the EBA Team dealing with crisis situations.

This important project will allow the definition of a manual and action plan that could be used as a prompt and efficient reference by the EBA Communications Team in case of a real crisis.

The Consultant may be expected to provide specific advice, directions and support on crisis communications and to develop crisis communications plans/rules.

The Consultant may also be expected to provide support in the development/implementation of the practical exercises, this will imply the conception of a:

* Crisis scenario;
* Situation mock-up;
* Action/re-actions plans;
* Development of a half-day practical exercise;
* Assessment: lessons learnt, strengths and weaknesses, best practices, actions to be undertaken;
* Definition of guidelines and detailed action plan to be used in case of a real crisis.
	1. Drafting, Editing and Creating Content

This item relates to the conception and development of written communications. The Consultant may be asked to define, draft, edit, re-write and correct various types of communications, messages and texts under instructions from the EBA, either in line with the communication working-plan or an ad-hoc basis.

The Consultant may for instance be expected to conceive and develop (non-exhaustive list):

* Key communication messages;
* Press releases and news items;
* Articles and editorial pieces;
* Info packs;
* Factsheets;
* Publications (print and electronic);
* PowerPoint presentations;
* Video scripts, correspondence, etc...

The Consultant may at times be required to deliver these types of products under tight deadlines.

Although the EBA may provide, as appropriate, guidance on the editorial approach, the target audiences and context, the length of the texts and background information material, the Consultant should be able to independently research information, also based on the resources identified or suggested by the EBA.

Originals will be written in English. All editorial content should be of high-level journalistic and linguistic standards, and should accurately convey facts and policy messages, based on or related to the scope of the EBA activities at large.

The Consultant should foresee on average three rounds of comments exchanges with the EBA. It will not be possible to charge additional rounds of exchanges that arise from obvious mistakes or shortcomings of the Consultant.

* 1. Design and Production of Communication Material

This point covers the conception, design and production of other communication material/projects; these could be either in print or other formats, such as multimedia.

At present, the main EBA publications (the Annual Report and the Risk Assessment Report) are produced by the Publications Office of the European Union, as part of a Service Level Agreement (SLA) signed in early 2013 between the EBA and this Office.

Through these Tender Specifications, the EBA intends to guarantee an additional service to the above, to which it can refer for those products/projects that either do not fall under the present Service Level Agreement or need to be produced in an alternative manner, for instance for reasons related to capacity, stringent deadlines or any other needs.

As a non-exhaustive indication, the Consultant may be asked to produce these types of products:

* General printed material related to events;
* Ad-hoc brochures and leaflets;
* Conference programmes;
* Templates and layouts in any file formats;
* Any other graphic material such as posters, panels, banners, electronic newsletters, etc.;
* Calendars presenting EBA’s meetings, public hearings, etc.;
* Branded notepads, desk blotters, folders, etc.

In relation to printed material, the Consultant may be requested to fulfil the following tasks:

* Propose design, define layouts, produce mock-ups for approval, select and retrieve images;
* Creation of artwork and graphic design for instance for material to be used for promotions, presentations, conferences, information packs, press kits, any other ad-hoc graphic material, etc.
* Adaptation of all the above mentioned products into digital and non-print formats, so they can be used on web or other digital supports, if needed;
* Printing and/or production of all the products referred to above.

All the material produced will have to be compliant with the EBA visual style guide.

For more information on the EBA’s logo and its use, see Annex VII.

The Consultant will also be expected to build up a library of images for the EBA. This will include images of EBA staff and headquarters, but also any other image not portraying the EBA which may however be used in the context of the EBA work (e.g. images or graphs for brochures or reports).

In addition to supplying the finished product, the Consultant will also have to make the source files and photos available to the EBA, so that these can be re-used, in the same or modified form, as needed.

Regarding the printing services, the price list in Annex IV to this tender includes only the core items that the EBA expects to order on a regular basis. It remains intended that the EBA may also require other types of printed products from the Consultant, depending on other needs that may arise in the meantime.

* 1. **Events**

As part of its communication and networking activities, the EBA organises a wide range of events on a regular basis and participates in events organised by other organisations too. These usually consist of conferences, workshops, seminars, media gatherings, exhibitions, speeches, to mention a few.

The Consultant may be expected to deal with all or part of the events related to the activities of the EBA, be these stemming from a specific communications project or strategic approach or falling under any other EBA initiative, such as ad-hoc requests for the EBA to participate in events organised by other parties.

Expected work on events would range from conception, design and organisation of events to arranging logistics and organisational aspects. In terms of geographical location, the EBA events could, a general indication, take place in London at the EBA seat or at any other major venue in another location in Europe and beyond, and could last from a few hours to a few days.

The Communications Team at the EBA may define the agenda and content of the meetings, but could ask advice and input on content to the Consultant to this regard. As an indication, here follows a non-exhaustive list of tasks grouped by type of event that the Consultant may be expected to deal with:

* + 1. Meetings and Conferences
* Find suitable venue which meets the EBA requirements
* Booking of venue and keep up with the reservation
* Organise Food and Beverages like coffee breaks, hot and cold lunches, and refreshments
* Organise AV equipment if necessary
* Preparing and/or printing of seating plans, name and table plates, presentations
* Design and printing of invitations, prospects, programmes, leaflets, reports and similar
* Arrange registration at the beginning of the meeting
* Provide necessary staff for the event to do registrations, welcoming and instructions, catering etc.
* Ensure a smooth process during the event
* Organise production of a possible conference report
* Invoicing after the event
	+ 1. Social Events – Visits
* Find suitable restaurants/venues which meet the EBA requirements
* Book restaurants/keep up with reservations
* Provide menu and wine suggestions from chosen restaurant
* If necessary prepare menu cards, seating plans other print outs
* Invoicing after the event
	+ 1. Other Possible Services
* Venue research for meeting rooms, restaurants and hotels
* Organisation of brunches and informal meetings
* Arrange Technical equipment for meetings at the EBA and meetings outside of EBA
* Arrange Video and Audio for recording and web streaming
* Arranging travel and accommodation for speakers and guests of the EBA
* Organise events for EBA staff like meetings, away days, team building events, charity events, company celebrations or Christmas/summer events
* Book hotels for participants coming from outside/keep up with reservations
* Propose social events in case of meetings during more than one day and with attendants coming from abroad.
	1. **Other communication activities**

The Consultant may be requested to advise and support the EBA on the implementation of any other communication tools or channels (and consequent activities) that either the EBA or the Consultant finds relevant. These would have to be framed in the context of reaching general or specific communications objectives, either as indicated in the communication strategy or not. A non-exhaustive indication of possible communication areas covered by this point follows.

* + 1. On-line and digital communications

The Consultant may be required to develop on-line communications products to present and promote the activities of the EBA, as well as its website. These products could for instance entail:

* Development of multimedia and digital material, such as info-graphics, html-based tools and other related on-line products;
* Specific web projects, in particular in relation to web-design, identification of new features for the website or web promotional products;
* Social media strategies/approaches.

In relation to the above points, it must be noted that the Consultant may be required to carry out such projects in conjunction with external suppliers with which the EBA has already contracts in place for the maintenance and/or implementation of the EBA website and related technicalities.

The Consultant would hence be expected to propose new projects, concepts and designs in line with the existing website and its technical requirements (which would remain the task of the other EBA supplier).

* + 1. Public Relations/Networking and Communities

Although, the communications work focused mostly on media relations so far, the EBA also intends to strengthen its relationship with its stakeholders and target audiences through other channels and by involving them more closely in its activities. This task may involve the conception of specific public relations and networking tasks, in order to create awareness and retain attention around specific activities or issues.

To this regard, the Consultant may also be expected for instance to advise on building and managing virtual spaces, attracting attention of relevant targets and creating interest around the EBA networks’ activities and by advising users and offering support services.

The Consultant may be expected to advise and monitor information and content related to users and EBA activities (e.g. news and events items, articles, blog entries, files), by updating the virtual spaces on different topics, activities, stakeholders.

The EBA Communications Team may also require the Consultant to monitor the engagement and feedback of users and advise on how to improve effective activities.

* + 1. Webcasting

For specific communication events (i.e. the EBA stress test) or meetings, the EBA may require the Consultant to cover webcasting in real time and on-demand, and provide related services such as micro-sites and hosting.

* + 1. Other Promotional Material

On an occasional basis, the EBA may also need to produce promotional goods to be distributed to target communication audiences. These could be for instance USB keys, mugs, umbrellas, pens, business card holders, passport covers, credit card holders etc.

These Tender Specifications shall enable the EBA to order these types of products on-demand. The Consultant may be expected to propose and deliver creative, innovative promotional goods that thematically fit to the EBA’s scope of work. These should be of high quality in terms of design, look, material, make, originality and practicality and in line with the EBA’s visual identity.

The Consultant may be requested to fulfil the following non-exhaustive list of tasks:

* Graphic design of promotional material;
* Layout/language adaptations if needed;
* Pre-press work (including supplying ready-to-print and source files);
* Present samples or specimens in order to obtain a final approval for production;
* Indicate detailed production planning in order to meet delivery deadlines;
* Production of print, textile and “gadget” promotional material;
* Delivery of promotional material (worldwide);
* Organise shipping, and pack and protect material against damage;
* Include transportation costs to the EBA premises or any other location, as requested by the EBA.

All intellectual property rights, including copyright, subsisting in all publications and all files used in their production shall be property of the EBA. All graphic work must be delivered to the EBA on request.

1. **Practical Examples of Typical Services**

Please see below examples that may help understand the type of services that can be requested by the EBA.

1. In the provision of media support, the Consultant may be requested to ensure the provision of the following deliverables/services in a timely manner before, during and following the event:

* Advise on media approach;
* Selection, verification and completion of media lists;
* Identification of moderators or speakers;
* Sending invitations to the press;
* Pitching to journalists to verify interest and confirm attendance;
* Preparation of press packs including some materials provided by the EBA;
* Writing and distribution of press releases;
* Organisation of logistics for the press briefing - venue, technical services, availability of materials, accreditation, etc.;
* Follow up with journalists after event;
* Monitor media coverage;
* Provide overview on the outcome/results of the event, as well as analytical feedback.

2. In the organisation of an event (press conferences, meetings, networking with Member States, etc.) the Consultant may be asked to ensure the provision of the following deliverables/services in a timely manner before, during and following the event:

* All relevant administrative, technical and secretarial support prior to, during and following the event;
* Maintaining contacts with the participants prior to, during and following the event;
* Compiling and maintaining a list for participant’s attendance, and issuing a final attendance list after the event, ensuring participants sign it at the event;
* Research and proposal to the EBA of appropriate meeting venues, once approved by the EBA, rental and set up;
* Setting up all relevant technical and other meeting equipment and supplies (e.g. translation services and related technical equipment, overhead projector, computer with power-point and other software, flip-chart/white board and pens, etc.);
* All transfers that may be needed within the place of the event, if the case;
* Arranging all catering, spaces for coffee breaks, lunches and other refreshments for participants;
* Arranging badges, name plates and meeting signs (all bearing the EBA logo and respecting the EBA corporate identity); arranging banners and any decoration in the room/on the tables which may be suitable for the type of meeting and level of participation.
* Arranging meeting documents and all required stationery carrying the EBA logo for the meeting (i.e. pens, paper, notebooks, folders, photocopied material, etc.)
* Dealing all sub-contracting and payments (including any necessary advance payments) required for all services for the event.
1. **Project Management**

The Consultant must set up a team capable of carrying out the assignments listed in these Tender Specifications. The Consultant's structure shall ensure sufficient flexibility to adapt to changing workloads, tight deadlines and evolving priorities.

The Consultant must be familiar with the environment of the EU institutions, be able to understand their mission, their functioning, as well as their audiences across the 28 EU Member States, being therefore capable of adapting easily to this essential pan-EU perspective.

The Consultant structure shall therefore also ensure sufficient flexibility to adapt to regional and national differences across the EU.

* 1. Contract Coordinator/Project Leader

In their tenders, Consultants must clearly designate a senior manager as project leader. The project leader will be the EBA's contact point and the sole interlocutor. The EBA will address any requests to him/her and s/he will attend follow-up meetings. The project leader must also propose answers and solutions regarding aspects related to the contract and any other organisational or administrative matters (including problems related to invoicing and payment), and must implement them once approved by the EBA.

* 1. Team

The team must combine all the knowledge and experience necessary to carry out the tasks described in these Tender Specifications, especially in relation to knowledge and experience in the banking/financial field and communications and press/public relations. All the members of the team who will be in contact with the EBA must be able to work in English. The team must also be able to operate throughout Europe and occasionally beyond (most likely in some Northern American and in Asian regions, as an indication).

The team proposed is expected to include these types of professional figures:

* Experts in communications for public/governmental institutions;
* Media and press relations experts;
* Media trainers;
* Content experts/researchers;
* Copywriters;
* Editors;
* Web-writers and social media experts.

Team members should also prove to have a good knowledge of the banking and financial sector and in particular sound understanding of EU and international policies in the banking field.

The Consultant must inform the EBA of any changes (departures, arrivals, promotions, etc.) in the composition of the team during the performance of the contract. The EBA reserves the right to request the replacement of any member of the team whose experience, competence or behaviour the EBA finds to be inadequate, stating its reasons.

1. **Reporting**

The Consultant shall ensure regular reporting on the implementation of activities and tasks either listed in these Tender Specifications or carried out in the context of the communication strategy. In particular, the Consultant shall provide the EBA with regular reports, such as an Annual Activity Assessment and other Final Activity reports, which may be related to specific tasks or projects, to be defined by the EBA.

The cost of producing the reports will be borne by the Consultant and included in its fees.

* 1. Yearly Report on Consultancy Activities

This report illustrates communications and media activities carried out during the current year by the Consultant, as well as all the other work s/he undertook for the implementation of the Framework Contract.

The report should be submitted in two paper copies and one electronic (by email) to the EBA within 30 days following the end of the reference period.

The report must show, for the preceding twelve months:

* The services performed during the given period, broken down by quantity and price, and by type;
* A qualitative and quantitative analysis of the impact of the activities undertaken in relation to the strategic objectives of the EBA;
* An overall evaluation of the work undertaken in terms of cost effectiveness;
* Lessons learnt and recommendations for future activities.

The EBA will reserve the right to request additional content in the above reporting activity.

* 1. Ad-hoc and Other Reports

The EBA may also require the Consultant to provide specific reports in relation to certain tasks, or certain projects or certain time-periods of work related to the framework contract.

* 1. Overall Progress Meetings

Progress meetings between the project leader and the EBA team to discuss the quality of the services provided and the scheduling of future actions will be held on a regular basis at the premises of the EBA in London.

These meetings may be held quarterly, as well as on an ad-hoc basis. They will aim at monitoring the overall work of the Consultant, as well as defining upcoming activities/strategic approaches.

The costs related to these meetings (transport, accommodation, preparatory work, etc.) will be borne by the Consultant and included in its fees.

* 1. Project Progress Meetings

Progress meetings between the project leader and the EBA team to discuss the progress of specific projects will be held on the premises of the EBA in London or over the phone on a regular or on an ad-hoc basis.

1. **How Services will be contracted under the Framework Contract**

The EBA can issue a purchase order or specific contract for services under the framework contract. The procedure for concluding a purchase order or specific contract is as follows:

1. The EBA will send a Request for Offer (RfO) with specific Terms of Reference (TORs) for the assignment to the Consultant together with a time schedule and any other information it considers relevant e.g. maximum budget available;
2. The Consultant will provide the EBA with a technical proposal and a detailed budget breakdown for the assignment within 7 working days (based on the number of participants, duration (N° of days) and specific needs of the services);
3. The EBA and the Consultant will agree upon a final budget;
4. The EBA will send a signed order form or specific contract to the Consultant. The Consultant will confirm receipt and acceptance of the assignment in writing within two working days by signing and returning the order form or specific contract. Upon receipt of the written confirmation, the assignment can begin.

At no stage in the process is the EBA legally bound to issue an order form or specific contract – it has no legal commitment to the Consultant in case, for example, agreement is not reached on the budget, an activity is cancelled, etc.

1. **Other Provisions**

*Copyright and other Intellectual Property Rights:*

Any results or rights thereon, including copyright and other intellectual or industrial property rights, obtained in performance of the contract, shall be owned solely by the EBA, which may use, publish, assign or transfer them as it sees fit, without geographical or other limitation, except where industrial or intellectual property rights exist prior to the contract being entered into force.

The Consultant must specify any parts of the services performed that are covered by copyright or any other rights of ownership. The Consultant must confirm that s/he has obtained the authorisation of the holder of these rights to use the above parts. Any costs arising from obtaining this authorisation will be borne by the Consultant and clearly identified on his invoice.

For details please refer to the provisions of the model framework contract.

*Travel and Subsistence Costs*

Travel and subsistence costs of the Consultant to a venue within the London area or its surroundings (within a distance of 50km from London) will not be reimbursed. For instance, any cost incurred for attending possible meetings shall be borne by the Consultant and so included in the quoted prices.

1. **Framework Contract**
	1. Type of Contract

The services described in these Tender Specifications will be the subject of a framework contract concluded between the EBA and the successful tenderer.

The framework contract will be for 12 months, renewable up to three times, each time for a 12 month period, thus the maximum possible contract duration is 48 months.

Each individual assignment, to be identified at a later stage, will be the subject of a purchase order for services or specific contract as appropriate.

The framework contract will lay down the legal, financial, administrative and technical conditions applicable throughout its period of validity, including price indexation. In replying to this invitation to tender, the tenderer declares that s/he accepts it.

 Submission of a tender implies acceptance of all the terms and conditions set out in this invitation to tender and in the model framework contract and waiver of the tenderer’s own general or specific terms and conditions. It is binding on the tenderer to whom the contract is awarded for the duration of the contract. EBA reserves the right to decline, without further comment, any tender that does not accept its model framework contract. Tenders shall include a written statement on the tenderer’s acceptance of the EBA’s model contract without reservations.

Signature of the framework contract does not commit the EBA to placing an assignment and does not give the Consultant any exclusive rights regarding the services covered by the framework contract.

In any case, the EBA reserves the right, at any time during the validity of the framework contract, to cease placing orders, without the Consultant having the right to any compensation. The EBA reserves the right to cancel the contract with any Consultant(s) whose services are deemed to be of insufficient quality based on quality audits.

* 1. Joint Offers and Subcontracting

Companies can consider two ways of collaborating in a tender: either as joint partners in the tender or through subcontracting. Unless stated otherwise in the contract notice and/or the tendering specifications, both **joint tenders** and **subcontracting** are allowed in response to a call for tenders issued by the EBA. Tenders may even combine both approaches. In any case, the tenderer must specify very clearly whether each economic operator involved in the tender is acting as a partner in a joint tender or as a subcontractor (this also applies where the various companies involved belong to the same group, or even where one is the parent company of the other).

Groups of economic operators (consortia) are authorised to submit tenders (joint offers). In this case, each member of the consortium shall fulfil the requirements and accept the terms and conditions set out in the Invitation to Tender, the Tender Specifications, the Model Contract as well as all the relevant annexes. The members of the consortium shall designate one member as Consortium Leader with full authority to bind the consortium and each of its members. The Consortium Leader shall act as a single point of contact with the EBA in connection with the present procurement procedure. The EBA may not demand that consortia must have a given legal form in order to be allowed to submit a tender. However, the consortium selected may be required to adopt a given legal form after it has been awarded the contract and before the contract is signed, if this change is necessary for the proper performance of the contract.

Joint tenders and sub-contracting are permitted for this contract.

All sub-contracting must be approved by the EBA, (by accepting the Consultant's offer). The Consultant shall ensure that any subcontractor s/he engages performs the work to a satisfactory standard.

The Consultant will remain responsible for any work performed by subcontractors and for their compliance with the deadlines agreed by the EBA.

The Consultant must clearly indicate which parts of the work will be sub-contracted.

1. **Volume of the Framework Contract**

*The EBA intends to award the framework contract to the successful tenderer for a maximum duration of four years and for a maximum estimated total potential value of between 800,000 and 900,000 Euro (over the 4 years).*

For additional services which are not included in these Tender Specifications but which, through unforeseen circumstances, would become necessary for the performance of the services under this contract, the EBA may make use of the negotiated procedure without prior publication of a contract notice and potentially award the additional contract to the Consultant performing this contract.

For new services consisting in the repetition of services similar to the ones initially entrusted to the Consultant under the contract, the EBA may make use of the negotiated procedure without prior publication of a contract notice and potentially award them to the Consultant performing this contract.

1. **Organisation of the Tender**

Tenderers should examine carefully and respect all the instructions contained in these Tender Specifications. Tenderers will structure their tender in five clearly identified and separate chapters, comprising:

1. The tenderer’s declaration relating to the Exclusion Criteria (see point 12 below), together with a cover letter on the official letter headed paper of the tenderer and signed by an authorised representative of the tenderer, confirming the name and the designation of the person who is authorised to sign the contract on behalf of the tenderer and the tenderer’s acceptance of the model contract and period of validity of the tender as required;
2. All the documents relating to the Selection Criteria (see point 13 below) together with duly completed and signed Legal Entity form (Annex II) and Financial Identification Form (Annex III) and the required supporting documents;
3. Financial Offer for Framework Contract: 3 copies of the fully completed unit Price list tables described at Annex IV duly signed by the tenderer (see below point 14).
4. 3 copies of the Technical Proposal and Team to be set up (including team leader and proposed experts, their experience, qualifications as well as detailed CVs (see point 15 below);
5. Case Studies: 3 copies of the description of approach and work organisation and financial proposal for the case studies/scenarios (see below point 16, including details on their evaluation).

Tenders should be submitted in one original and two copies together with one electronic copy on CD, DVD or USB stick.

Please note that compliance with the Exclusion and Selection criteria are the necessary requirements for the tender to be considered. The technical proposal and the case studies together with the case study financial proposals will be the subject of the evaluation of the tenders, in order to award the contract (see point 17 below for more detail).

1. **Exclusion Criteria**

Tenderers will be excluded from this procurement procedure if they are found to be in any of the situations mentioned in Annex IX (Declaration of Honour). Each tenderer must provide an original Declaration of Honour as per the template found in Annex IX – “Declaration of Honour” on Exclusion Criteria and Absence of Conflict of Interest, which must be dated and signed by the legal representative of the tenderer. Any attempt by a tenderer to obtain confidential information, enter into unlawful agreements with competitors or influence the evaluation committee or EBA during the process of examining, clarifying, evaluating and comparing tenders will lead to the rejection of its tender and may result in administrative penalties.

1. **Selection Criteria**

In order to perform the contract, the tenderer must comply with and give proof of the following types of capacity and capability:

* economic/financial,
* legal,
* technical/professional.

For proof of this, except for the cases where original documents are requested, copies of original certificates/documents issued by an official authority in the country of origin or provenance may be accepted.

* 1. Economic and Financial Capacity: Selection Criteria

The tenderer’s average annual turnover for the last three years for which accounts have been closed must be at least **EUR 1,200,000 (one million two hundred thousand Euros).**

Evidence to be provided:

* Balance sheets or extracts from balance sheets, profit and loss accounts for the last three years for which accounts have been closed, or equivalent documentation (e.g. where company law in the country in which the tenderer is established does not require the publication of the balance sheet);
* The Financial Capacity Form (**Annex VIII**), in original, duly filled in and signed by an authorised representative of the tenderer.
* Evidence of relevant professional liability insurance: please provide details of the applicant’s insurance policies in respect of its business and those with particular relevance to this application. In particular, state if the applicant holds professional risk indemnity insurance. Where a joint application is proposed, please present the information for each member individually:
	+ Policy type
	+ Name of insurers
	+ Policy Number
	+ Expiry Date
	+ Brief details of the level and risks included
* If a tenderer relies on the capacities of other entities, a written undertaking - in original - on the part of those entities confirming that they will place the resources necessary for performance of the contract at the tenderer’s disposal.

If, for any valid reason, the tenderer is unable to provide the documents requested by the contracting authority, he may prove his economic and financial standing by other types of document whose appropriateness will be considered by the contracting authority.

* 1. Legal Capacity: Selection Criteria

The tenderer must prove that he is authorised to perform the contract under national law.

Evidence to be provided:

* A certificate of registration/incorporation in the relevant trade or professional register in the country of establishment/incorporation. If the tenderer is not required or allowed to register in such a register for reasons related to its statute or legal status, the EBA shall accept, as satisfactory evidence, a sworn declaration or certificate, membership of a specific organisation, express authorisation or entry in the VAT register.
	1. Technical and Professional Capacity: Selection Criteria

The tenderer must have relevant experience on similar communication projects to those described in these Tender Specifications. The communication projects must have been completed during the past three years. In order to prove so, tenderers are required to provide evidence of:

* + - * 1. completion of at least 3 projects in the past 3 years involving provision of strategic advice on communication campaigns carried out on a global/international level (adapting strategic approach and tone of the language to different countries);
				2. of these 3 projects at least one must have had a minimum value equivalent to EUR 50,000;
				3. of these 3 projects at least one must have been carried out for a public organisation operating in any sector or for any organisation (public or private) operating in sectors related to the activities of the EBA.

***→*** *In order to prove their technical capacity, tenderers must complete - for each of the 3 projects - a “****Project Description Grid”*** *which can be found in Annex VI. In these grids, tenderers must indicate the precise type of work carried out, the date, the value of the project and the client.*

The evaluation committee will examine the tenders to ensure that the information requested in the selection criteria has been provided and that the tenderer fulfils all these criteria.

* 1. Information related to other parties/subcontractors

Any tenderer may, where appropriate and for a particular contract, rely on the capacities of other entities. It must in that case prove to the contracting authority that it will have at its disposal the resources necessary for performance of the contract, for example by demonstrating that those entities have undertaken to place these resources at the disposal of the tenderer. Under the same conditions, a consortium of economic operators may rely on the capacities of members of the consortium or of other entities.

In the case of a consortium submitting an offer, each member of the consortium must provide the required evidence. The evidence provided by each member of the consortium will be checked to ensure that the consortium fulfils the criteria as a whole.

1. **Financial Offer for Framework Contract**

Tenderers must submit a financial offer using the **Price List provided in Annex IV to these Tender Specifications.** This list includes the services and products that the tenderer must be able to deliver.

The unit Price List tables in Annex IV must be completed and signed by the tenderer. This will form the list of prices to be used for services during the first year of the framework contract.

Prices submitted in response to this tender shall be fixed and not subject to revision for the first year of performance of the framework contract. Prices may be revised after one year.

The Price List in Annex IV is not exhaustive.

1. **Technical Proposal and Team**

Tenderers should include in their bid a technical proposal chapter detailing how they intend to perform the tasks covered by the contract in compliance with all requirements of the Tender Specifications. The technical proposal will be structured as follows:

* 1. Rationale

The tenderer should provide a general description of the contract rationale, including any comments on the Tender Specifications that the tenderer deems important for the successful execution of the contract, thus demonstrating the degree of understanding of the contract, particularly in the context of the communication activities, as well as the mandate, of the EBA and related activities and needs. This part should not exceed 1,500 words.

* 1. Understanding of the EBA’s role and tasks

The tenderer should describe its understanding of the role of the EBA role in general and in comparison to other actors involved in the banking regulation and supervision sector (National central banks, National Supervisory Authorities, European Central Bank, European Commission) and the subsequent communication challenges for the EBA. This part should not exceed 1,500 words. It should be based on the tenderer’s research and should not be made of texts copy/pasted from EBA’s documents.

* 1. Organisation and Methodology

The tenderer should provide in this part a document outlining a description of the proposed project management for the contract, so that the services outlined in these Tender Specifications are carried out as efficiently as possible in terms of costs, time and quality.

This part should not exceed 1,500 words and include:

* + - * 1. Information on the project cycle (description of the different steps from the EBA’s request to the delivery of the final product(s) within a given deadline).
				2. Information regarding quality assurance (a description of the measures employed to ensure the quality of the deliverables).
				3. Information regarding maintenance and support (availability, average response time(s) to email requests etc.)
				4. Information on measures in place to ensure flexibility in the implementation of the contract: including how the tenderer handles cancellation of orders, change management etc.
	1. Proposed Team

The tenderer shall provide a description of the proposed team organisation, giving details on the role of each team member and on how the contract will be implemented. This part should not exceed 500 words (CVs excluded – for these see point below).

In the case of a tender being submitted by a consortium, a description of the input from each of the consortium members will be needed, as well as information on the distribution and interaction of tasks and responsibilities between members.

In case it is relevant, a description of sub-contracting arrangements foreseen, if any, with a clear indication of the tasks that will be entrusted to a sub-contractor and to what extent (proportion in %) and the quality assurance methods to be used in relation to these tasks.

* 1. Team Members and Curriculum Vitae (CVs)

The Curriculum Vitae (CVs) of the project leader and main team members responsible for carrying out the project (maximum two pages per team member) must be submitted. Only the CVs of members assigned to the tasks will be taken into consideration in the evaluation of the tender

The CVs must show evidence of the experience and necessary/relevant qualifications. Tenders are requested to use the European template, which can be downloaded at: <http://europass.cedefop.europa.eu/europass/home/hornav/Downloads/EuropassCV/CVTemplate.csp>.

The tenderer must have the following profiles of expertise:

* Director: S/He must have a minimum of 10 years’ experience in a similar role and experience in projects similar to those described in these Tender Specifications.
* Project leader/Account manager (senior): S/He must have a minimum of 5 years’ experience in a similar role and experience in projects similar to those described in these Tender Specifications.
* Copywriter — English (senior): S/He must have a minimum of 3 years’ experience in delivering projects similar to the ones described in these Tender Specifications and a proficient level in written and spoken English.
* Any other relevant profiles must have a minimum of 2 years’ experience in delivering projects similar to the ones described in these Tender Specifications.

The CVs will be assessed in terms of technical expertise in managing similar projects, and priority will be given to seniority in managing similar projects.

* 1. Evaluation Grid for the Technical Proposal

The subject of the first part of the technical evaluation will be the response to the points listed above as set out in the table below.

**Quality Threshold:** only tenderers scoring 75 points or more (out of a maximum of 100 points) against the technical award criteria below will be eligible for the second part of the technical evaluation. Tenderers scoring less than 75 points will not be considered further.

|  |  |  |
| --- | --- | --- |
| **No** | **CRITERIA** | **MAX SCORE** |
| **1** | **Rationale –** Max1,500 words | **20** |
| **2** | **Understanding of the EBA’s role and tasks** – Max 1,500 words | **15** |
| **3** | **Organisation and Methodology** – Max 1,500 words | **35** |
| **4** | **Proposed team –** Max500 words (not including CVs) | **20** |
| **5** | **Clarity –** The tenderer will be evaluated based on its ability to present a clear and concise technical proposal. | **10** |

1. **Case Studies (2nd part of the Technical evaluation)**

In addition to the above, tenderers shall present a technical proposal in response to the 3 case studies described below. This is the second part of the technical evaluation and will consist of the evaluation of the technical proposals in response to these 3 case studies.

Proposal should describe the approach intended to be employed in order to achieve the stated objective. They should also submit a financial proposal containing the prices they would charge, broken down by item and reflecting the unit prices laid down in the Price List in Annex IV.

These cases are presented as a guide only. They cannot be regarded in any way as an indication of the priorities and exact nature of future actions. They are purely a simulation of a fictional request for services, for the purpose of evaluating the approach, methodology/work organisation, quality and price of the services that the tenderer would be capable of providing.

These case studies and price lists cannot be considered under any circumstances to constitute a commitment on the part of the EBA to place orders for the related services, and cannot give rise to any right or legitimate expectation on the part of the tenderer.

**Please note that responses to each case study must not be longer than 2,000 words (excluding breakdown of costs).**

* 1. Case Study A

The EBA will launch in summer 2014 a major report with data (see <http://www.eba.europa.eu/-/eba-presents-data-on-high-earners-in-eu-banks>) on the revenues in the banking sector in the EU. The report is awaited by the stakeholders in the sector, some of which had expressed criticism for a similar report last year. It is likely to obtain very ample media attention, but it is also likely to attract negative comments (from concerned stakeholders) which may cause misperceptions of the scope of the report and ultimately the role of the EBA. The Communication Team decides to launch the report during a specific press briefing in Brussels in order to better target EU institutions and sector organisation. It is necessary to look into:

The EBA plans to have at least 30 attending journalists plus 4 EBA staff members.

* **Defining the strategic approach** of the press stunt (up to 50 journalists could be interested in the event), definition of quantifiable objectives (to be measured), strategic approach, pitching angle to ensure coverage, messages to be conveyed to ensure correct understanding of the contents of the report, media to be approached, pre-empt possible criticism, definition of lines to take (reactive), selection of EBA speakers and their briefing.
* **Logistics related to the event**: the tenderer shall find a selection of three venues where the briefing could take place, propose time plan, arrange invitations/pitching, arrange catering, all supporting equipment, press folders, etc.

The tenderer is requested to:

* + Propose format of the event and strategic approach;
	+ Propose suitable venues in Brussels (hotel, conference centre or independent venue);
	+ Take care of services at venue: room with board room style set up for the participants;
	+ Take care of equipment as complete as possible, including for instance (but not only) audio visual equipment, table microphones, one or two hostesses mending the venue and presentation facilities.
	+ Organisation of catering (refreshments and coffee break).
	+ Describe all steps for the organisation of the event and media attendance;
	+ Propose a timeline for the activities (from date of briefing meeting with the EBA to the event).
	+ Provide a financial offer using the prices from your Price List in Annex IV.

**Please note that responses to each case study must not be longer than 2,000 words (excluding breakdown of costs).**

* 1. Case Study B

The EBA will celebrate its third anniversary in 2014. For this occasion, the Communication Team has been asked to organise in London:

* A **high-level external conference** for stakeholders over 2 half-day sessions (afternoon 1st day and morning 2nd day). The EBA communication team has defined 2 roundtables for each session, which will see 5 VIP participants in each (from the EBA, as well as other organisations) taking stock of banking regulation in the EU, as well as discussing topics related to the work of the EBA, from past achievements to future steps. A public of roughly 50 invitees from the media, stakeholders and other organisations are expected to assist each roundtable. The tenderer shall deal with all logistical aspects related to the event: identify appropriate venue in London, arranging seating, tables, screens, reception space, badges, management of invitees lists, refreshments, conceiving and organising print version of the programme and setting up a concise communications plan to ensure that appropriate publicity is given to the event, in order to reach all concerned parties, as well as obtaining some media visibility on the occasion of the EBA’s third anniversary.
* **A high-level dinner for VIPs**. The EBA intends to organise a social dinner on the night of the first day of the event. A selected number of 80 persons among speakers at the roundtables, EBA staff and representatives from other organisations at EU and Member State level are invited. The tenderer shall deal with all logistical aspects related to the social dinner: identify appropriate venue in London, arrange seating, tables, propose menus and manage invitees’ lists.

The tenderer is requested to:

* + Find venue (hotel, conference centre or independent venue) at a central location with excellent access to public transportation and full services, including: 2 plenary room with theatre style seating, a set-up for panel discussion for speakers and a lectern, break-out rooms with a board room set-up for approx. 10 persons.
	+ Provision of technical equipment (audio visual) and on the spot support for the plenary room only. AV equipment should include lapel microphones and presentation facilities.
	+ Organisation of conference material (in particular, 200 hardcover A4 programs of 15 pages double sided in colour - content provided by EBA).
	+ Organisation of two mailing rounds to all participants (before and after the event) including directions and then arranging event evaluation.
	+ Interpretation services (One interpreter English/French speaking and one English/German speaking).
	+ Organisation of catering (lunch, refreshments and two coffee breaks).
	+ Propose hotel accommodation for participants preferably close to the venue.
	+ Organisation of transport to and from the airport for invited speakers and accommodation.
	+ Propose a suitable plan for the event and social dinner, including all logistical aspects, as well as related communications plan;
	+ Prepare practical local information for each of the cities/hotels/public transport etc. (PDF document in line with the EBA’s visual identity.
	+ Organisation of catering (lunch, refreshments and two coffee breaks per day).
	+ Describe all steps for the production of the event;
	+ Devise an appropriate work-plan with timeline.
	+ Propose an appropriate and cost-effective approach for the services; for that purpose, the tenderer shall provide a price including a description of costs for its proposal including all related expenditures.
	+ Provide a financial offer using the prices from your Price List in Annex IV.

**Please note that responses to each case study must not be longer than 2,000 words (excluding breakdown of costs).**

* 1. Case Study C

As part of improving its relationship with stakeholders (most of which based in London) and EU institutions (most of which based in Brussels), the EBA is looking into producing a new corporate leaflet to present its objectives and activities. The document could also be made available in a multimedia format so that the same information can also be used on the following two supports: video for presentations, as well as an animated version with the use of info graphics (not a simple movie or downloadable PDF) for the EBA website.

The tenderer is requested to:

* + Propose a suitable and innovative design, using the text provided in Annex V, for the layout of the leaflet (format A4, 4 pages (2 pages double sided);
	+ Describe all steps for the design and production of the leaflet (including printing of 1000 copies on 200 gr. coated silk or matt paper, 4 colours printing);
	+ Propose a timeline for the production and delivery to London (from date of order to receipt date at the EBA);
	+ Propose suitable and innovative formats for the video and for the animated version to be displayed on the EBA website;
	+ Propose an appropriate and cost-effective approach for the services;
	+ Provide a financial offer including a description of all costs with unit prices, personalisation, technique used, production, and all other related expenditures using prices from your Price List in Annex IV.

**Please note that responses to each case study must not be longer than 2,000 words (excluding financial offers).**

* 1. Evaluation of the Case Studies (2nd part of the Technical evaluation)

Tenderers should submit a proposal for each of the 3 case studies, detailing how they intended to perform the tasks deemed necessary or appropriate and in line with the communications requirements described in these Tender Specifications.

All 3 case studies will be evaluated according the evaluation grid below. **A Technical Quality Threshold applies** to each case study: only tenderers scoring 75 points or more (out of a maximum of 100 points) will have their proposal taken into consideration for the overall evaluation of their application. Applications from tenderers scoring less than 75 points on any of the 3 case studies will not be considered further.

Note that the text submitted will have to show understanding of the case study and of the role of the EBA and cannot be a simple copy paste of EBA official documents.

***Note that a breakdown of costs (including agency fees wherever applicable) is also expected for each of the case studies. This will be the subject of the financial evaluation described under point 17.***

|  |  |  |
| --- | --- | --- |
| **No** | **CRITERIA** | **MAX SCORE** |
| **1** | **Rationale and Understanding**The evaluation for this criterion will be based on the ‘Rationale and Understanding’ document:Understanding of the EBA’s communications needs and the nature of the service requested in the case studyAssessment of key issues pertaining to the service requested in the case study | **20** |
| **2** | **Organisation and Methodology**The evaluation for this criterion will be based on the ‘Organisation and Methodology’ document:Project managementMeeting deadlinesQuality controlCustomer service methodologyFlexibilityFollow-up after completion of the project | **25** |
| **3** | **Proposal for the case study**The evaluation for this criterion will be based on the answer of the tenderer to the proposed case study:Proposed approach to the delivery of the requested servicesApplied methodologyEffectivenessTimeframes | **35** |
| **4** | **Clarity**The evaluation for this criterion will be based on the ability of the tenderer to present a clear and concise technical proposal and, in particular, to respect the **2,000 words limit** set for the technical proposal. | **20** |

1. Financial evaluation (based on the 3 Case Studies)

Tenderers should submit a detailed budget for each of the 3 case studies above. Prices must be stated in Euro net of VAT and broken down similarly to the model in Annex IV to these Tender Specifications.

These 3 detailed budgets will constitute the financial evaluation and will be examined with the purpose of comparing prices, i.e. the examination of the case study financial proposals will form the financial evaluation of the tenders.

For each of the 3 budgets submitted, the cheapest (i.e. the lowest total amount for all the case studies) will receive the maximum points available. The remaining prices will receive lower points in proportion to the cheapest price.

**Financial scores** will be calculated according to the following formula:

* **Financial score for Tender A = 100\*(Lowest price/price offered by Tenderer A)**
1. **Award of the Contract**

The contract will be awarded to the tenderer offering the best value for money, i.e. the tenderer that offers the best quality to price ratio (most economically advantageous tender).

The most economically advantageous tender will be calculated by weighing technical merit against price on an 80/20 basis according to the following formula:

* **80/100\*(Score for Technical Proposal + Total Technical Score for 3 Case Studies) + 20/100\*(Average Financial Score of 3 Case studies)**