

**TENDER N°: CFT/12/ETF/0004**

**TITLE: “PROVISION OF DIGITAL COMMUNICATION  
SERVICES”**

## **TENDER DOSSIER**

- **PART A: TENDER SPECIFICATIONS**
- **PART B: DRAFT CONTRACT**

## PART A: TENDER SPECIFICATIONS

### 1. Terms of Reference

#### SUMMARY OF SERVICE REQUESTED

<b>Title of this service</b>	Provision of digital communication services
<b>Expected start date</b>	May 2012
<b>Expected end date</b>	May 2016
<b>Maximum budget available</b>	€ 1.000.000
<b>ETF Contact person</b>	Francesca Ferrandino

#### BRIEF BACKGROUND RELEVANT FOR THE SERVICE

##### ***The ETF Communication Unit***

The ETF Communication Unit is responsible for producing accurate and substantive communications materials, which describe EU-funded activities implemented by the ETF. As the ETF is a centre of expertise in human capital development, knowledge sharing is also a dominant objective of the ETF communication activities.

The overall objectives of the ETF communications efforts therefore are:

- To contribute to the ETF's recognition as a centre of expertise helping transition and developing countries to harness the potential of their human resources through the reform of education, training and labour market systems in the context of the EU's external relations policy.
- To support policy development and knowledge sharing in the field of the ETF competence and responsibility.
- To enhance the impact of the EU external assistance programmes as well as identify and exchange good practice.
- To meet the obligations of the ETF as a public organisation in increasing the transparency of its activities and providing public access to the relevant documentation.

The ETF has many highly diverse target groups:

- *Key stakeholders / policy makers* (the European Parliament, the Council of Ministers, the European Commission, national governments and public institutions, etc.) need highly structured and synthesised information and analysis including concrete examples, clear conclusions and recommendations as the basis for policy making.
- *Practitioners, sector specialists and other professionals* need more detailed, action-relevant information, including analysis and comparable data, but also examples of good practice which can be used for further initiatives and decision making.
- *Experts and researchers* are interested in entire comprehensive scientific reports, preferably including raw data.
- *Media* need short, highly structured and synthesised information including concrete examples and clear conclusions.

These audiences are far from homogeneous in interests, requirements and attitudes. A further dimension to the diversity of the ETF audiences is the use of languages. Many of the above mentioned specialist and non-specialist target groups are used to communicate in English, while others are not.

## ***The ETF digital communication activities***

The ETF's website and digital communication activities share the same overall objectives that are the basis of all ETF communication activities.

They include all activities and tools developed to reach our external and internal audiences primarily by means of our website, our extranets and intranet as well as through third party websites, digital channels, tools and applications.

Also, the same target groups are addressed. More specific target groups of the website include

- **policy makers, EU and government representatives** - this audience is mostly interested in accessing administrative or regulatory documents and overseeing the project management process
- **human capital development and country experts and practitioners** - looking for in-depth content and data on our specific expertise and for interesting information on developments in the field
- **media** - general and specialised media finding highly reusable, structured content
- **job seekers, contractors and potential suppliers**
- **general public** – audience with no EU or specific expertise

While the general public look for general information about the organisation and its activities in a user-friendly, guided way; the practitioners, experts and decision makers need a more specialised approach.

### **The ETF web presence**

The ETF website is designed to be multilingual, although currently only the English version has been implemented. Its main content will be provided in six languages: four official EU languages (English, French, German and Italian) and two partner country languages (Arabic and Russian). Core static pages will be in all six languages. More in-depth and frequently updated information will continue to be provided in English only with the exception of pages of interest to a particular language group.

The website has been recently redesigned and some features are still to be implemented. It has been developed in Lotus Notes and its content is managed by an online editing interface and is also fed by several other Lotus Notes databases which are used for different purposes and from which some content is pushed onto the website.

The ETF also maintains a basic presence and distributes some information on social channels such as Twitter, Facebook and YouTube. On the occasion of some specific events, this presence may be reinforced and dedicated mini-sites or dedicated channels can also be activated.

Internal communication is supported by an Intranet which we are looking at further developing by introducing a stronger underlying database, improving the content management tool, making it more interactive and suitable for knowledge sharing.

## **OBJECTIVE AND EXPECTED RESULTS OF THE SERVICE**

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### **Objective of the requested service:**

The purpose of this tender is to select a contractor to provide through a framework contract **ad hoc services** in the areas of digital design, communications and marketing as well as multimedia communication. In addition, there will also be the requirement for **longer-term assignments to strategically support maintenance and continuous improvement** under the framework contract. Finally, there will also be a requirement to design and produce multimedia / audio / video communication to be predominantly embedded in the website, but on occasion to be standalone.

**Expected results:**

The successful tenderer will be mainly required to provide services in the area of digital communication, web design and web marketing, both **in terms of strategic support and implementation**.

The main focus will be on the continuous improvement and maintenance of the ETF website, extranets and intranet so that:

- users may navigate them intuitively
- information is well organised and easy to find
- they are captivating in their look and effective in the way they provide information to all target groups
- they are a container for the totality of the ETF's expertise and knowledge and they make the most of available information, providing it in different ways (web page, text, video, audio, downloadable pdfs, etc.) depending on the content and the audience
- they are effective in
  - consistently marketing the ETF as an organisation
  - providing a reputable knowledge sharing platform for ETF expertise
  - meeting the transparency obligations of the ETF as a public organisation
- they offer means for interaction
- they are well marketed and promoted across the web
- their content is maintained in the most cost-effective way
- they evolve in line with best practice and new trends in digital communication
- they are consistent with each other and in line with the general communication practice

Advice on and/or implementation of activities in the areas listed below may be required and it may include, but not be limited to, the subset of activities detailed under each area.

**1. Business analysis and web strategy**

- Development of the web strategy in line with business and communication objectives
- Identification of user requirements
- Development of functional and technical specifications related to digital communication tools

**2. Researches, feasibility, usability and accessibility studies**

- Analysis, research, benchmarking activities related to digital communication, related reports and recommendations to improve ETF digital communication activities, web site usability, user experience and accessibility
- Feasibility studies on web communication aimed at analysing the applicability of selected services and practices to the ETF website(s), digital communication activities and related reports and recommendations
- Surveys and questionnaires aimed at analysing the experience of current and potential ETF digital communication recipients, identifying areas of possible improvement and providing recommendations

**3. Web structure**

- Information architecture
- User experience design – front and back end

**4. Web design and layout applied to website(s), extranets and intranet and other digital tools**

- Scoping, design and layout of web and application interfaces, front and back end
- Database architecture related to website information management
- Graphic design applied to web, digital tools and elements
- HTML and CSS coding

All web designs shall be provided according to web standards (XHTML+CSS), allow implementation with the use of standard and accessible HTML coding and shall normally be provided as HTML files. All markup shall pass W3C validation and all content/objects/documents shall be optimised for the web. Vector or bitmap graphics may also be required as well as other file formats for objects or documents to be embedded in the web site or other multimedia materials.

### **5. Digital marketing**

Provision of advice and services to promote the ETF web presence as well as the visibility of the website and its content throughout the web by means, for example, of social media presence, search engine optimisation (SEO), and any other forms of technical or commercial web marketing practices.

Traffic analysis and reporting - including identifying relevant indicators and appropriate requirements for technical implementation, providing periodic and on call reporting on traffic and SEO.

### **6. Web content sourcing, drafting/editing and updating**

Provision of support in managing and updating content of the website and other digital channels, upon request. This may also be required at the ETF premises.

While most technical content is sourced and drafted internally or through other contracts, the contractor may be asked to manage general content in some occasions. One case may be for example a conference web site when the contractor may be asked to source and update the content for generic sections.

### **7. Multimedia tools and applications design and production**

Design and produce multimedia products to distribute ETF content.

The contractor may also be asked to provide some of the above services for other web-based projects: project websites, intranet, web campaigns, back-end interface or other web-based productions.

In case of particular project events, the contractor may also be asked to provide a full web service from design to implementation including development, integration and hosting.

## **HOW SERVICES WILL BE CONTRACTED UNDER THE FRAMEWORK CONTRACT**

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The ETF can issue order forms for specific services under the framework contract. An example of the order form used is attached to the Draft Contract. The procedure for concluding an order form is as follows:

- 1 The ETF will send a Request for Offer (RfO) with specific Terms of Reference (TORs) for the assignment to the contractor together with a time schedule and any other information it considers relevant e.g. maximum budget available;
- 2 The contractor will present to ETF, within five calendar days, a detailed budget breakdown of the assignment, which will be based upon the prices quoted in the framework contract (see section 3.2.ii);
- 3 The ETF and the contractor will agree on the distribution of the budget into fees, and reimbursable costs where applicable;
- 4 The ETF will send a signed order form to the contractor and the assignment can begin.

At no stage in the process is the ETF legally bound to issue an order form. Therefore the ETF has no legal commitment to the contractor in case the agreement is not reached on the budget, an activity is cancelled, etc.

## **BUDGET**

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Any change in the specifications which will impact on the budget occurring during the life of the contract must be agreed in writing with the ETF before implementation.

The maximum budget available to issue order forms under the framework contract is € 1,000,000.

The budget for each assignment will be that agreed between the ETF and the contractor in the signed order form.

The actual fee rates and/or prices will be those quoted by the successful tenderer in their financial proposal.

Please, refer to the financial proposal for more information on the budget.

Any other more specific requirements for the use of the budget may be mentioned in the specific terms of reference attached to the order form.

### **Reimbursables:**

Reimbursement of travel and subsistence costs shall be made in accordance with the applicable ETF rules, which will be provided to the Tenderer to whom the contract will be awarded.

## **APPENDIX**

Appendix A: Joint offers and subcontracting

## Appendix A

### Joint offers and subcontracting

#### A. JOINT OFFERS

##### 1. Definition

A joint offer is a situation where an offer is submitted by a **group of tenderers**.

Tenders can be submitted by groupings of service providers/suppliers who will not be required to adopt a particular legal form prior to the contract being awarded. However, the selected group might be required to adopt a given legal form after it has been awarded the contract if this is necessary for proper performance of the contract.

##### 2. Tendering documents

The offer has to be signed by the lead partner of the group which has been duly authorised by the other members of the grouping when the tenders have not yet formed a legal entity.

Partners in a joint offer assume **joint and several liability** towards ETF for the performance of the contract as a whole.

The group must clearly indicate which service provider will be carrying out which tasks as well as who has been appointed by the others as the lead partner. The lead partner shall be the contracting party with ETF and shall be responsible for the overall performance of the contract and management of the other members of the consortium.

All the information on exclusion and selection criteria of each member of the group must be included in the offer.

##### 3. Evaluation of exclusion and selection criteria

The **exclusion criteria** will be assessed in relation to each company individually. Each member of the group must be eligible in accordance with **section 3.1** below and provide the required evidence.

The exclusion of a member of the group leads to the exclusion of the group.

The **selection criteria** will be assessed in relation to the combined capacities of all members of the group as a whole. Therefore, as evidence of the financial capacity of the group, combined evidence must be submitted (e.g. a statement indicating the combined turnover of all the members of the group).

##### 4. Evaluation of award criteria

The **award criteria** will be assessed in relation to the tender, irrespective of whether it has been submitted by a single legal/natural person or by a tendering group.

## **B. SUB-CONTRACTING**

### **1. Definition**

Sub-contracting is a situation where a contract has been or is to be established between ETF and a contractor and where the contractor, in order to carry out the contract, enters into legal commitments with other legal entities for performing part of the work, service or supply.

An economic operator may, where appropriate and for a particular contract, rely on the capacities of other entities, regardless of the legal nature of the links which it has with them in order to contribute directly to the performance of the activities mentioned in the tender specifications.

The tenderer may include in its request to participate/offer any level of subcontracting in order to demonstrate that it fulfils the **selection criteria**.

### **2. Tendering documents**

The tenderer must provide in his offer:

- (1) A document
  - clearly stating the identity, roles, activities and responsibilities of subcontractor(s) and;
  - specifying the volume/proportion for each subcontractor
- (2) A letter of intent by each subcontractor stating its unambiguous undertaking to collaborate with the tenderer if he wins the contract and the extent of the resources that it will put at the tenderer's disposal for the performance of the contract.

If the above-mentioned documents are not provided, the contracting authority shall assume that the tenderer does not intend subcontracting.

### **3. Evaluation of exclusion and selection criteria**

The tenderer has to furnish the documents regarding the **exclusion and selection criteria** on his behalf and the subcontractor has to countersign them. In this case, if the subcontractor is subject to exclusion, the tenderer will be excluded. The **selection criteria** will be assessed in relation to the combined capacities of the tenderer and the subcontractor. Therefore, as evidence of the financial capacity, combined evidence must be submitted (e.g. a statement indicating the combined turnover of the tenderer and the subcontractor).

### **4. Evaluation of award criteria**

The **award criteria** will be assessed in relation to the tender.



## 2. Timetable

The timetable for this tender procedure and signature of the resulting contract(s) is as follows:

	Date	Comments
Tender launch date	25.01.2012	Date publication sent to OJ
Deadline for request of clarifications	05.03.2012	
Site visit or clarification meeting (if any)	---	
Last date on which clarifications are issued by ETF	07.03.2012	
<b>Deadline for submission of offers</b>	<b>19.03.2012</b>	See 'Guidelines for ETF public procurement' for more details
Interviews (if any)	---	
Opening session	26.03.2012	At 14.30 local time
Evaluation of offers	02.04.2012	Estimated starting date
Notification of award	<b>Eight week after evaluation date</b>	Estimated
Contract signature	<b>Twelve weeks after evaluation date</b>	Estimated
Commencement date of activities	<b>May 2012</b>	Estimated

### 3. Preparing a tender: required documents

#### 3.1 Supporting Documentation

Tenderers must provide a full set of documents for each of the following three areas, which the evaluation committee will assess before proceeding with evaluation of offers.

##### ***i) Declaration on Exclusion Criteria***

Tenderers are required to provide the completed and signed 'Declaration on exclusion criteria'.

This standard declaration form is available for downloading at the following address:

[http://www.etf.europa.eu/web.nsf/pages/Open\\_tenders](http://www.etf.europa.eu/web.nsf/pages/Open_tenders).

Tenderers will be excluded in case they are in any of the situations listed in the declaration on exclusion criteria. The ETF may request further documentary evidence to support this self-declaration before contract award.

##### ***ii) Selection documentation***

Tenderers must prove that they have the technical & professional, and economic & financial capacities to effectively perform and administer the contract.

##### **Technical & professional capacity**

Tenderers must be able to demonstrate that they have the requisite experience to successfully deliver this contract.

Evidence of this capacity must be provided by:

A list of assignments that the company has carried out in the past three years which demonstrate an understanding of the nature and subject of this contract, using the following template.

You need to list a minimum of 10 and a maximum of 30 assignments. You may not include assignments that do not specifically relate to the purpose of this tender or have not been carried out in the past three years. You may not include assignments that have been carried out by employees or subcontractors of the tenderer when not employed by the tenderer itself.

Please note that anything exceeding the number of items or the word count specified will not be considered.

<b>Project Title</b>	
<b>Client</b>	
<b>Value €</b>	
<b>Dates (start/end)</b>	
<b>If you are participating in this tenderer as a consortium, please specify which member of the consortium carried out this assignment</b>	
<b>If the assignment was delivered by a consortium, please list all other partners</b>	
<b>How this assignment is relevant to this tender</b>	
<i>Max 300 characters without spaces.</i>	
<b>Key services delivered by tenderer</b>	
<i>Max 600 characters without spaces.</i>	

*If applicable, clearly state which services were carried out by subcontractors or, if the project was delivered by a consortium, by the other partners.*

*Do not include visual examples.*

### **Economic & financial capacity**

The tenderer must be able to prove that he is in a stable financial position.

Evidence of this capacity must be provided by:

1. The presentation of balance sheets and profit and loss accounts for the past three financial years for which accounts have been closed.
2. The following table on the tenderer's financial stability duly filled in:

Parameter	Formula	Value (to be filled in by tenderer)		
		N-3	N-2	N-1
Working Capital	$\frac{\text{Current Assets}}{\text{Current Liabilities}} =$			
Financial Independence	$\frac{\text{Own Funds}}{\text{Total Liabilities (Equity \& Third Party Debts)}} =$			
Net Result	----			
Turnover related to the services requested	----			

Where N is the current year for which accounts have not been closed.

In the case of a consortium submitting an offer, each member of the consortium must provide the required evidence. For 'technical and professional capacity' the evidence provided by each member of the consortium will be checked at consortium level to ensure that the consortium fulfils the criteria.

### **iii) Standard forms**

Tenderers must provide the following forms duly completed and signed:

Legal Entity Form and related supporting document(s):  
[http://ec.europa.eu/budget/contracts\\_grants/info\\_contracts/legal\\_entities/legal\\_entities\\_en.cfm](http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm)

Financial Identification Form :  
[http://ec.europa.eu/budget/contracts\\_grants/info\\_contracts/financial\\_id/financial\\_id\\_en.cfm](http://ec.europa.eu/budget/contracts_grants/info_contracts/financial_id/financial_id_en.cfm)

### 3.2 Offer: Technical Proposal & Financial Proposal

The tenderer's offer must demonstrate an understanding of the ETF terms of reference and be presented in clear concise language.

#### i) Technical proposal

The technical proposal must include the following four sections. It must be provided in one original signed copy and six copies on electronic media (e.g. CD-ROM, USB-key, DVD).

##### **A. Methodology**

Tenderers shall provide a methodology consisting of three sub-sections and not exceeding 30,000 characters in total.

##### **Contract management**

An outline of how the contract will be managed. If applicable, this should also include a clear methodology of how subcontractors will be managed and/or how members of the consortium will coordinate the workload and ensure the overall quality of the contract management.

##### **Project management**

An outline of how individual projects will be managed, planned and delivered.

##### **List of services**

A list of all the web and digital communication services the tenderer can provide (including at least the ones listed on pages 4-5 of the terms of reference) with a description of the methodology applied for the delivery of each of them.

##### **B. Case studies**

Using the following template, provide four case studies that best illustrate the tenderer's work in the area of:

1. business analysis and digital communication strategy
2. web design
3. digital marketing
4. social media campaigns

<b>Project title</b>	
<b>Project type</b>	<i>Indicate which of the four areas listed above this case study relates to</i>
<b>Client</b>	
<b>Value €</b>	
<b>Dates (start/end)</b>	
<b>If you are participating in this tenderer as a consortium, please specify which member of the consortium carried out this assignment</b>	
<b>If the assignment was delivered by a consortium, please list all other partners</b>	
<b>How is this project relevant to the ETF and this tender</b>	
<i>Max. half a page*</i>	
<b>Background + brief</b>	
<i>Max. half a page*</i>	
<b>Key services + process</b>	

*Max. two pages\**

*If applicable, clearly state which services were carried out by subcontractors or, if the project was delivered by a consortium, by the other partners.*

### **Results**

*Description (max. one page) plus visual examples (max. 3)*

*(\*one page is considered to be 1500 characters without spaces)*

## **C. Team composition**

Tenderers will propose a **Project Director** who will have the overall responsibility for the running of the framework contract and the formal contacts with the ETF. The Project Director will sign-off all the outputs required for the specific assignments and have ultimate responsibility for timely and professional delivery. In particular they will have the following tasks:

- responsibility for monitoring the delivery of each individual assignment
- monitoring of the services rendered and of the performance of the experts for the assignments
- quality control of the specific contract outputs
- participation in briefing/debriefing when required for an assignment (as per specific terms of reference)
- providing ongoing guidance and needs analysis

The project director must have a minimum of 10 years professional experience (of which at least five years must be in a senior management position) in communications or marketing and account management and be fluent in both written and spoken English.

The costs of contract management, the backstopping mechanism and quality control are considered as overheads and should be included in the expert fees, while the Project Director's participation in specific framework assignments should not be included in the expert fees, but is to be budgeted separately in the offer when required for a given assignment.

Both senior and junior **experts** may be required for the implementation of the framework assignments. They should meet the following minimum requirements:

Qualifications and skills:

- attainment of Bachelors Degree or equivalent; or
- equivalent professional experience of two years

General professional experience:

Senior: at least 8 years experience in the sector(s) related to the position for which they are proposed

Junior: at least 3 years experience in the sector(s) related to the position for which they are proposed

## Staff roles required

<b>Project Director (Senior management role)</b>	See above for required qualification and experience
<b>Project Manager (Senior role)</b>	Plans and delivers projects and acts as a contact person on individual projects
<b>Project Assistant (Junior role)</b>	Supports the project manager in coordinating resources and monitoring project progress
<b>Business Analyst/Digital Strategist (Senior role)</b>	Analyses organisational needs and identifies relevant digital tools and their functional specifications to meet the organisation's goals
<b>Creative Director (Senior role)</b>	Translates the overall business objective into a visual solution for digital tools
<b>Technical Director (Senior role)</b>	Translates functional requirements into technical specifications that work within a set IT framework
<b>User Experience Designer (Senior)</b>	Applies information architecture, interaction design, usability, user interface design to digital tools
<b>User Experience Designer (Junior)</b>	Carries out hands-on work as directed by senior user experience designer
<b>Web/Interface Designer (Senior)</b>	Develops/applies graphic design and converts it into a form which can be viewed on relevant digital platforms
<b>Web/Interface Designer (Junior)</b>	Carries out hands-on web design work as directed by the senior web designer
<b>Content Entry Staff (on site)</b>	Inserts content provided by the client on websites or other digital products at the ETF premises
<b>Content Entry Staff (off site)</b>	Remotely inserts content provided by the client on websites or other digital products
<b>Web Developer (Senior)</b>	Develops web and other digital applications to functional and technical specifications
<b>Web Developer (Junior)</b>	Carries out hands-on work as directed by the senior web developer
<b>Data Architect (Senior)</b>	Designs data architecture and builds relational databases developing data acquisition and implementation models
<b>Data Architect (Junior)</b>	Carries out hands-on work as directed by the senior data architect

Evidence should be provided in the form of CVs of staff proposed for all the above roles. CVs should be no longer than 4 pages, and are to be compiled using the Europass CV template which can be downloaded at <http://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>. The role(s) for which each person is proposed should be clearly stated at the top of the CV in question.

## D. Scenario

The tenderer is required to provide a response to the following scenario.

In October 2011 the ETF organised a conference on Women and Work, with the objective of taking stock of developments in the area and of facilitating discussions on the challenges of implementing gender equality policies. The event's practical focus was on improving and increasing women's opportunities in training and employment.

During the event the ETF presented the findings of a background study on gender policies in ten countries, each of which has different contexts and challenges, and are at different stages in implementing policies to:

- create equal opportunities and remove obstacles for women to work;
- empower women through greater access to education and training at all levels;
- promote gender equality as a fundamental right, a common value, and a necessary condition for the achievement of the objectives of growth, employment and social cohesion.

The study mapped the stakeholders and institutions involved in the key functions and evaluated what they do and what kind of issues they face in implementing their roles.

To support this initiative and create opportunities for all key actors to be kept up to date about challenges, solutions and progress made, the ETF intends to launch a *Women and Work Platform*, a series of virtual tools aiming to support stakeholders in different countries with the implementation of their own gender equality policies; bring them together; exchange information; offer help to address concrete issues; provide an overview of progress and lessons learnt; provide access to general information such as policies, national regulations, methodologies, etc.; collect and communicate achievements.

In this scenario the tenderer is required to provide:

#### **1. Action plan (max. 4 pages)**

An action plan of how you would support the ETF in the decision making process concerning the development of the platform should be provided. This should include a list and description of the steps and activities you would take to assess the needs and tools that are currently available, identifying possible gaps and suggesting a solution. The plan should include time, resources allocated and relevant costs which should be in line with the costing provided in your financial proposal.

Please note that under this section you are not required to actually carry out the analysis nor to provide the solution, but only to draft an action plan of how you would proceed. No further information about the current solutions in place at the ETF is therefore needed.

#### **2. Layout and look and feel**

Presuming the analysis identified the need for a dedicated website, a proposed layout and look and feel for the homepage as well as for two internal pages of your choice should be provided. This should be in line with the current ETF corporate identity and contain the elements that you feel should be prominent for the ETF.

This should be accompanied by a rationale document of no more than one page.

#### **3. Content (max. four pages plus two-page page tree)**

- A description of all elements and content that you consider important to include in such website
- A page tree

#### **4. Other suggestions (max. 8000 characters)**

All other elements and suggestions that you would consider essential to address by means of digital tools within this scenario.

#### **The technical proposal shall also contain:**

- an indication of the name and contact details of the person responsible for the tender;
- if the tenderer is a consortium, an indication of the consortium leader;

- any other specific requirements contained in the Terms of Reference;
- any elements of the terms of reference on which you feel remarks, comments or suggestions are necessary.

**ii) Financial proposal**

Tenderers must use the following standard format (see next page) to present their financial proposal.



General comments on the financial proposal:

- All prices must be quoted in **Euro**. If necessary, please use the conversion rates published in the Official Journal of the European Communities on the day when the invitation to this tender was issued. This information is available on the following website of the European Central Bank: <http://www.ecb.int/stats/eurofxref>.
- Prices must be quoted free of all duties, taxes and other charges (including VAT) as the ETF is exempt from such charges under Articles 3 and 4 of the Protocol on the privileges and immunities of the European Communities for services rendered by tenderers having their place of business within the European Union.
- The tenderer to whom the contract will be awarded will have the sole responsibility for complying with law laws which apply to him in line with Article II.11 to the draft contract.

<b>ROLES</b>	<b>Fee for 1 day in €</b>	<b>Fee for half day in €</b>
<b>Management roles</b> <ul style="list-style-type: none"> <li>• Project Director</li> <li>• Creative Director (Senior role)</li> <li>• Technical Director (Senior role)</li> </ul>		
<b>Total management roles</b>		
<b>Business roles</b> <ul style="list-style-type: none"> <li>• Project Manager (Senior role)</li> <li>• Project Assistant (Junior role)</li> <li>• Business Analyst / Digital Strategist (Senior role)</li> <li>• Web / Digital Strategist (Senior role)</li> <li>• User Experience Designer (Senior)</li> <li>• User Experience Designer (Junior)</li> <li>• Web / Interface Designer (Senior)</li> <li>• Web / Interface Designer (Junior)</li> </ul>		
<b>Total business roles</b>		
<b>Technical roles</b> <ul style="list-style-type: none"> <li>• Content Entry Staff (on site)</li> <li>• Content Entry Staff (off site)</li> <li>• Web Developer (Senior)</li> <li>• Web Developer (Junior)</li> <li>• Database Architect (Senior)</li> <li>• Database Architect (Junior)</li> </ul>		
<b>Total technical roles</b>		

For details on the evaluation of the price see section 4.

**I hereby acknowledge and accept the assumptions to the financial proposal presented above:**

**Name  
(legal representative)**

.....

**Signature**

.....

**Date**

.....

#### 4. Evaluating the offers: award criteria

ETF will use the following award criteria to evaluate the offers received:

Technical award criteria	Weighting (out of 100)
Description of the methodology applied	25
Case studies	15
Composition of the team	10
Scenario	20
<b>Financial award criteria</b>	
Fees for management roles	9
Fees for business roles	18
Fees for technical roles	3

##### Minimum threshold score against technical award criteria:

Tenderers scoring less than 45 points of the total score for all of the technical award criteria will be excluded. Furthermore, tenderers scoring less than half points for any one of the technical award criteria will be excluded.

##### Comments on evaluation of the price:

With regards to the evaluation of price, for each fee type (management roles, business roles and technical roles) the sum of all daily and half daily for that particular role will be used.

##### Evaluation on the basis of best value for money:

The formula used by the ETF to calculate which offer represents the best value for money incorporates the score for the technical quality and price as described at paragraph 6.3 to the **Guidelines for ETF public procurement** ([http://www.etf.europa.eu/web.nsf/pages/Open\\_tenders](http://www.etf.europa.eu/web.nsf/pages/Open_tenders)).

## 5. Checklist for submission of tender

When submitting a tender you must acknowledge that you have read and understood the **Guidelines for ETF public procurement** ([http://www.etf.europa.eu/web.nsf/pages/Open\\_tenders](http://www.etf.europa.eu/web.nsf/pages/Open_tenders)), and ensure that you have compiled your tender in accordance with the below checklist, to be attached to your technical proposal.

Please Tick ☒ the boxes below

- ☐ I have read and understood the **Guidelines for ETF public procurement**
- ☐ I have read and I accept the terms and conditions of the **draft contract**
- ☐ I have submitted my tender within the stipulated deadline
- ☐ I have submitted my tender in three separate inner envelopes (A, B and C) within an outer envelope or parcel
- ☐ I clearly stated the following information on the outer envelope or parcel:
  - The reference number of the Call for Tender (CFT/12/ETF/0004).
  - The title of the tender
  - The name of the tenderer
  - The indication "Offer – Not to be opened by the internal mail service"
  - The ETF address for submission of offers
  - A clear postmark showing the date
- ☐ I have sealed the outer envelope or parcel with adhesive tape and signed across the seal
- ☐ I have drafted my tender in one of the official languages of the European Union
- ☐ Both the technical and financial proposals are signed by the tenderer's legal representative

I confirm that **Envelope A** contains one signed original of the following **supporting documentation**:

- ☐ The required Declaration on Exclusion Criteria
- ☐ The required evidence of the Selection Documentation
- ☐ The duly completed and signed Legal Entity Form and required supporting document(s)
- ☐ The duly completed and signed Financial Identification Form

I confirm that **Envelope B** contains:

- ☐ One signed original and 6 copies of the **technical proposal** on electronic media
- ☐ The present checklist duly signed and dated

I confirm that **Envelope C** contains:

- ☐ One signed original of the **financial proposal** presented in the requested format

Name

(legal representative)

.....

Signature

.....

Date

.....

## **PART B: DRAFT CONTRACT**

This draft contract, together with the ETF terms of reference and the successful tenderer's offer - technical and financial proposals – will form the legal agreement between the two parties for implementation of the service and all required administrative and financial conditions.