

# TENDER SPECIFICATIONS

**Call for tenders N° IMI.2017.OP.209**

**IMI 10<sup>th</sup> Anniversary Campaign**

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# 1 Information on tendering

## 1.1 Participation

This procurement procedure is open to any natural or legal person wishing to bid for the assignment and established in any of the European Union Member States, Norway, Iceland or Liechtenstein. Under the Stabilisation and Association Agreements (SAA) economic operators from Albania, the Former Yugoslav Republic of Macedonia (FYROM), Montenegro, Serbia, Bosnia & Herzegovina and Kosovo are also eligible to submit a tender.

## 1.2 Contractual conditions

The tenderer should bear in mind the provisions of the draft contract, which specifies the rights, and obligations of the contractor, particularly those on payments, performance of the contract, intellectual property rights, confidentiality, and checks and audits.

## 1.3 Compliance with applicable law

The tender must comply with applicable environmental, social and labour law obligations established by Union law, national legislation, collective agreements or the international environmental, social and labour conventions listed in Annex X to Directive 2014/24/EU<sup>1</sup>.

## 1.4 Joint tenders – participation of consortia

A joint tender is a situation where a tender is submitted by a group of economic operators (natural or legal persons). Joint tenders may include subcontractors in addition to the members of the group.

In case of joint tender, all members of the group assume joint and several liability towards the Contracting Authority for the performance of the contract as a whole, i.e. both financial and operational liability. Nevertheless, tenderers must designate one of the economic operators as a single point of contact (the leader) for the Contracting Authority for administrative and financial aspects as well as operational management of the contract.

After the award, the Contracting Authority will sign the contract either with all members of the group, or with the leader on behalf of all members of the group, authorised by the other members via powers of attorney.

## 1.5 Subcontracting

Subcontracting is permitted but the contractor will retain full liability towards the Contracting Authority for performance of the contract as a whole.

Tenderers are required to identify subcontractors whose share of the contract is above 20 % and those whose capacity is necessary to fulfil the selection criteria.

During contract performance, the change of any subcontractor identified in the tender or additional subcontracting will be subject to prior written approval of the Contracting Authority.

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<sup>1</sup> Directive 2014/24/EU of the European Parliament and of the Council of 26 February 2014 on public procurement and repealing Directive 2004/18/EC (OJ L 94, 28.3.2014, p. 65)

## 1.6 Structure and content of the tender

The tenders must be presented as follows:

**Part A: Identification of the tenderer (see section 1.7)**

**Part B: Non-exclusion (see section 4.1)**

**Part C: Selection (see section 4.2)**

**Part D: Technical offer**

The technical offer must cover all aspects and tasks required in the technical specifications and provide all the information needed to apply the award criteria, including:

- a creative concept for the campaign, including at least three proposed main campaign messages (slogans);
- a proposal for the visual branding of the campaign, including at least three variations of the IMI 10<sup>th</sup> anniversary logo;
- a creative proposal for a series of at least six short videos which will be produced as part of the campaign, including main messages, format, and how the videos will fit into the overall campaign;
- a proposal for a Twitter advertising campaign designed to promote campaign materials (videos, infographics, etc), and maximise engagement with the target audience. The contractor should also propose key performance indicators designed to evaluate the impact of the advertising campaign at the end of the contract.

Proposals submitted as part of the technical offer should be considered as a starting point for the campaign work, and not as the final product. All the campaign materials will be finalised in cooperation with the IMI Programme office upon the signature of the contract.

Offers deviating from the requirements or not covering all requirements may be rejected on the basis of non-compliance with the tender specifications and will not be evaluated.

**Part E: Financial offer**

The IMI2 JU maximum contract amount has been estimated at € 250 000 excluding VAT. The contracting authority may exercise the option to increase the estimated contract amount at a later stage via negotiated procedure with the successful tenderer(s) in accordance with Article 134 (1) (e) and (f) of the Rules of Application of the Financial Regulation.

Tenderers should use make use of the Model Financial Offer made available in Annex 5 to draw up their financial offers.

The price for the tender must be quoted in euro. Tenderers from countries outside the euro zone have to quote their prices in euro. The price quoted may not be revised in line with exchange rate movements. It is for the tenderer to bear the risks or the benefits deriving from any variation.

Prices must be quoted free of all duties, taxes and other charges, including VAT, as the European Union is exempt from such charges under Articles 3 and 4 of the Protocol on the privileges and immunities of the European Union. The amount of VAT may be shown separately.

## 1.7 Identification of the tenderer

The tender must include a **cover letter** signed by an authorised representative presenting the name of the tenderer (including all entities in case of joint tender) and identified subcontractors if applicable, and the name of the single contact point (leader) in relation to this procedure.

In case of joint tender, the cover letter must be signed either by an authorised representative for each member, or by the leader authorised by the other members with powers of attorney. The signed powers of attorney must be included in the tender as well. Subcontractors that are identified in the tender must provide a letter of intent signed by an authorised representative stating their willingness to provide the services presented in the tender and in line with the present tender specifications.

All tenderers (including all members of the group in case of joint tender) must provide a signed Legal Entity Form with its supporting evidence. The form is available on:

[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)

The tenderer (including each member of the group in case of joint tender) must provide the following information in its tender if it has not been provided with the Legal Entity Form:

- For legal persons, a legible copy of the notice of appointment of the persons authorised to represent the tenderer in dealings with third parties and in legal proceedings, or a copy of the publication of such appointment if the legislation applicable to the legal person requires such publication. Any delegation of this authorisation to another representative not indicated in the official appointment must be evidenced.

- For natural persons, if required under applicable law, proof of registration in a professional or trade register or any other official document showing the registration number.

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

The tenderer (or the leader in case of joint tender) must provide a Financial Identification Form with its supporting documents. Only one form per tender should be submitted. No form is needed for subcontractors and other members of the group in case of joint tender. The form is available on:

[http://ec.europa.eu/budget/contracts\\_grants/info\\_contracts/index\\_en.cfm](http://ec.europa.eu/budget/contracts_grants/info_contracts/index_en.cfm)

The tenderer (and each member of the group in case of joint tender) must declare whether it is a Small or Medium Size Enterprise in accordance with [Commission Recommendation 2003/361/EC](#). This information is used for statistical purposes only.

## 2 Technical specifications

### 2.1 Background and context

The Innovative Medicines Initiative Joint Undertaking ("IMI", "IMI2 JU" or "the contracting authority") was launched in 2008 as a public-private partnership between the European Union and the European Federation of Pharmaceutical Industries and Associations (EFPIA). We are working to improve health by speeding up the development of, and patient access to, the next generation of medicines, particularly in areas where there is an unmet medical or social need. We do this by facilitating collaboration between the key players involved in healthcare research, including universities, pharmaceutical companies, other companies active in healthcare research, small and medium-sized enterprises (SMEs), patient organisations, and medicines regulators. This approach has proven highly successful, and IMI projects are delivering exciting results that are helping to advance the development of urgently-needed new treatments in diverse areas ([www.imi.europa.eu/projects-results/success-stories-projects](http://www.imi.europa.eu/projects-results/success-stories-projects))

In 2018, we will be celebrating our 10<sup>th</sup> anniversary. This will represent an excellent opportunity to showcase what IMI has achieved in that time. On this occasion, we would like to launch a communication campaign to celebrate and raise awareness of our successes and achievements. The campaign will start on 30 April, the day on which the first IMI Call for proposals was launched in 2008.

The main objective of the campaign will be to raise the visibility of IMI achievements among IMI's broader stakeholders (academics in the field of health and medicines, SMEs in the biotech sector, the pharmaceutical industry and medical professionals) with a special focus on **citizens, patients** and **policy-makers**. As such, the language used should be made of simple, short and clear words to convey messages understandable to a lay audience. The main language of the campaign will be English.

The objective of this Call for tender is the conclusion of a service contract between the Innovative Medicines Initiative (IMI) and an economic operator for the creation of the campaign, including production of visual and audio-visual materials.

## 2.2 Tasks and deliverables

The project will consist of the following tasks.

### 2.2.1 Creation of main campaign messages

The supplier should come up with strong messaging for IMI's 10<sup>th</sup> anniversary campaign. This should include at least three powerful campaign slogans which will underpin and connect together all communication activities during the campaign.

The messaging should reflect IMI successes and achievements and underline that IMI projects are delivering outstanding results (e.g. IMI is a success, IMI delivers). For background information on IMI successes see the information at the following links:

- [http://www.imi.europa.eu/sites/default/files/news/Brochure\\_ResultsImpact.pdf](http://www.imi.europa.eu/sites/default/files/news/Brochure_ResultsImpact.pdf)
- <http://www.imi.europa.eu/projects-results/success-stories-projects>
- [http://www.imi.europa.eu/sites/default/files/uploads/documents/apply-for-funding/call-documents/imi1/IMI\\_Highlights2017.pdf](http://www.imi.europa.eu/sites/default/files/uploads/documents/apply-for-funding/call-documents/imi1/IMI_Highlights2017.pdf)

### 2.2.2 IMI's 10<sup>th</sup> anniversary logo and visual branding

For the purposes of this campaign, the contractor shall create the IMI 10<sup>th</sup> anniversary logo. The logo should be a spin out of the current IMI logo, and must adhere to IMI's official [visual identity manual](#).

Furthermore, the contractor should create visual branding of the campaign, which will underpin and connect all the visual, audio-visual and print material created during the campaign. This should include the consistent use of the 10<sup>th</sup> anniversary logo, as well as colours and patterns chosen for this occasion. Material which is part of the campaign should be clearly recognisable, while at the same time strictly adhering to the [IMI's visual identity](#). The contractor shall provide the logo and visual branding in formats specified and requested by IMI.

### 2.2.3 Social media visuals

The contractor shall create material for promotion of the campaign on IMI's social media channels, as follows:

- 10<sup>th</sup> anniversary banners for IMI's Twitter and LinkedIn accounts;
- a series of social media cards containing the main campaign messages and visual branding of the campaign. The contractor should create at least three different cards, with three different powerful messages.

The social media cards should be delivered in formats suitable for posting on Twitter and LinkedIn (e.g. jpeg). The contractor should also supply IMI with editable versions of the cards in PowerPoint, so that the main text on the cards could be changed and the cards could be re-used for other purposes.

All social media material produced must respect [IMI's visual identity](#) and the visual branding of the campaign. Original files made in the Adobe Creative Suite should also be delivered.

#### **2.2.4 Videos**

A centrepiece of the campaign will be a series of short videos (60-90 seconds long) containing testimonials from IMI key stakeholders. There should be at least six videos including testimonials from the following IMI project participants:

- small and medium-sized enterprise
- academic
- patient
- industry representative
- regulator

There should also be at least one testimonial from a person (e.g. from the European Commission) who was involved in the creation of IMI.

As part of the creative proposal, the contractor should suggest the exact format of the videos and the main messages, which should be consistent with the creative concept of the campaign and the main campaign messages. The final format, number and length of the videos will be decided in agreement with the IMI Programme office.

The video(s) should include custom footage filmed with IMI project participants in various EU countries. IMI office will provide assistance in selection of participants to be filmed. The supplier will be responsible for organising the filming in agreement with the participants. In order to minimise travel expenses, IMI could help find participants in a cluster of neighbouring countries (e.g. Belgium, Germany, Netherlands, France). However, at least one of the participants should be from one of the newer Member States (e.g. Hungary, Croatia or similar). Travel expenses should be included in the offer and will not be reimbursed separately.

The contractor will provide all services related to the production of a finalised video file, i.e. filming, dynamic images, post-production editing and effects, text images, royalty-free audio tracks and music purchased by the supplier in agreement with IMI.

The production means the full process from concept through to post production and final delivery, and includes developing and agreeing all (and any) related documents (shot lists, story boards, selecting and procuring appropriate music and other sound effects agreed, release forms, footage, animations and images, etc.) that is agreed as part of the package to be delivered.

The supplier should include all actions that would be necessary in the post production phase to ensure editing, and audio-visual synchronisation and any other technical processes needed are delivered so that the final format of the video is ready for dissemination.

The video style should respect [IMI's visual identity](#) and include light, clean, well-transitioned footage to convey a positive and powerful message. It should also adhere to the visual branding of the campaign (use of 10<sup>th</sup> anniversary logo, etc).

The video file should be delivered in both standard and high definition in formats specified by IMI. The files will be intended for use by commonly available video players, for YouTube uploads and use on social media channels.

The videos should be filmed in English and should also include English subtitles.

#### **2.2.5 Book of projects and highlights brochure**

In line with the visual branding of the campaign, the contractor should also create the following layouts:

- A book of IMI projects (this will include summaries of 15-20 project achievements. An example of a project summary can be seen here: <http://www.imi.europa.eu/projects-results/project-factsheets/u-biopred>).
- The IMI Highlights 2018 brochure (see latest brochure here: [http://www.imi.europa.eu/sites/default/files/uploads/documents/apply-for-funding/call-documents/imi1/IMI\\_Highlights2017.pdf](http://www.imi.europa.eu/sites/default/files/uploads/documents/apply-for-funding/call-documents/imi1/IMI_Highlights2017.pdf))

IMI will provide content for both brochures. The contractor will be tasked with layout, design and selecting punchy messages for the pull-out quotes, cover page and similar.

The layouts should be delivered in the formats suitable for publishing online, printing in-house, and by a professional printer. The supplier should also deliver the original files in the Adobe Creative Suite, along with all the fonts used in the layout. Additionally, the contractor shall provide detailed copyright information concerning all images and illustrations (for printing purposes).

All layouts produced must respect [IMI's visual identity](#) and the visual branding of the campaign.

### **2.2.6 Infographic with IMI key achievements**

Another project deliverable will be an infographic with key IMI achievements and successes (e.g. number of projects, number of publications, number of project outputs, etc).

The IMI office will provide the statistics for the infographic and the contractor will be responsible for making an infographic in line with the visual branding of the campaign.

The infographic should be made in the formats suitable for publishing on the IMI website and distribution on IMI social media channels, as follows:

- a jpeg for publication on the website (e.g. <https://erc.europa.eu/sites/default/files/content/erc-achievements.jpg>)
- a series of visual cards (jpegs or similar) which could be posted on the IMI's social media channels (Twitter, LinkedIn).

All infographic material produced must respect [IMI's visual identity](#) and the visual branding of the campaign. The supplier should also deliver the original files in the Adobe Creative Suite.

### **2.2.7 Presentations and posters**

In order to brand all the events which IMI will organise, co-organise and participate in 2018, the contractor should also deliver the following outputs:

- IMI 10<sup>th</sup> anniversary PowerPoint presentation, containing at least five slides:
  - o the cover slide with the 10<sup>th</sup> anniversary branding;
  - o at least three slides containing information on IMI achievements during the last 10 years. In order to create content for these slides, the contractor may adapt the information in the infographic and other material produced for the campaign. These slides shall be made by using the existing IMI PowerPoint template which will be provided by IMI;
  - o the closing slide with 10<sup>th</sup> anniversary branding.
- 10<sup>th</sup> anniversary poster in several different formats (for online publication, in house printing, professional printing, etc). The poster shall contain one of the campaign slogans, and will be selected in cooperation with the IMI Programme office;
- IMI 10<sup>th</sup> anniversary visuals in a format suitable for printing on various promotional materials such as bags. The visual should contain the IMI 10<sup>th</sup> anniversary logo and one of the campaign messages (to be agreed with the IMI office). The IMI office will specify the format in which the visuals shall be delivered.

All visuals produced must respect [IMI's visual identity](#) and the visual branding of the campaign. The supplier should also deliver the original files in the Adobe Creative Suite.



### 2.2.8 Campaign webpage

For the purposes of the campaign, IMI office will also create a dedicated webpage on the IMI website ([www.imi.europa.eu](http://www.imi.europa.eu)). The contractor should provide text and visuals for the creation of the page. The webpage should contain at least:

- a short introductory text containing main campaign messages and describing the campaign;
- an image or a banner with campaign visual branding;
- all other materials produced for the campaign, as they are produced (video, infographic, brochures, etc).

All material produced must respect [IMI's visual identity](#) and the visual branding of the campaign. The contractor will provide the materials and IMI office will upload them onto the webpage.

### 2.2.9 Twitter advertising campaign

As part of their financial offer, the supplier should set aside a small provisional budget which could be used for boosting the campaign material through Twitter advertising (the maximum budget for this shall not exceed 10 000 euros). As part of the technical offer, the contractor should submit a proposal on how this budget could be best used to increase the campaign reach and engagement with the target audience (as defined in section 2.1.)

At the end of the campaign, the contractor should produce a brief report on the impact of the advertising campaign, using key performance indicators agreed with the IMI programme office.

## 2.3 Production methods

The IMI Programme office will provide statistics and information necessary for the creation of the campaign content, such as information on IMI programme and projects, contacts of participants, etc.

The contractor will be responsible for the creative concept of the campaign (e.g. visual branding and main messages), as well as creating all visual and audio-visual material.

For each deliverable, multiple iterations may be necessary before the final product is accepted by the IMI programme office. This should be taken into account in the timeline and costs of the campaign production.

The contractor will not get access to the IMI website, nor will they attend events organised throughout the year. Dissemination of campaign materials through those channels will be done by the IMI Programme office.

For the purposes of the Twitter advertising campaign, the contractor may get limited access to IMI's Twitter account. Alternatively, IMI's social media manager may administrate the campaign, following the guidelines of the contractor's social media advertising expert. As part of their offer, the contractor should propose the best workflow for the advertising campaign, keeping in mind that the access to the IMI account should very be limited. The final workflow will be agreed with the IMI office upon the signature of the contract.

## 2.4 Dissemination

All the multimedia products produced for the campaign will be published on the IMI website, and promoted via the IMI newsletter and social media channels (mainly Twitter and LinkedIn).

In order to amplify our impact and extend reach, IMI office will also seek support from its partners: projects (90 and counting), the European Commission services, EFPIA as well as other EU agencies. The support will mainly consist of disseminating 10<sup>th</sup> anniversary campaign materials via our partners' social media accounts. For this purpose, the contractor should create an online platform (e.g. by using Trello) which will enable sharing and easy download of the campaign materials, including the video, infographic, and social media materials.

Throughout the year, IMI will participate in, organise and co-organise several large events, which will be used to disseminate campaign materials and amplify its reach. The culmination of the campaign will be IMI's annual Stakeholder Forum, which will take place in mid-October 2018 in Brussels and will include a celebration of IMI's 10<sup>th</sup> anniversary, the organisation of which will be subject to contractual arrangements different from those resulting from the present call for tender.

## 2.5 Deliverables schedule

The contractor will transfer the deliverables described in point 2.2. to IMI via a cloud-based file transfer service.

Indicative final deliverables schedule:

Deliverable	Date	Activity
D1	April 15	Main campaign messages
D2	April 27	10 <sup>th</sup> anniversary logo and visual branding (for the campaign kick-off on 30 April)
D3	April 27	Intro text and visual for the campaign webpage
D4	April 27	Social media visuals and the final proposal/guidelines for the Twitter advertising campaign
D5	May 31	Infographic and the Highlights brochure layout
D6	May 31	Posters, Visuals and PowerPoint templates for event branding
D7	Aug 31	Videos
D8	Sept 30	IMI book of projects layout
D9	Before the end of contract	A short report on the impact of the Twitter advertising campaign, using KPIs agreed with the IMI Programme office

The deadlines indicated here refer to the delivery of final products. In order to meet the deadlines, the contractor should submit first drafts of those deliverables at least 20 working days before the indicated final deadline. As stated above, multiple iterations may be needed before the final drafts are accepted by the IMI office.

The duration of the tasks shall not exceed **10 months**. This period is calculated in calendar days.

Execution of the tasks begins after the date on which the Contract enters into force.

In principle, the deadlines set out above cannot be extended. The Contractor is deemed solely responsible for delays occasioned by subcontractors or other third parties (except for rare cases of *force majeure*). Adequate resources and appropriate organisation of the work including management of potential delays should be put in place in order to observe the timetable below.

A **kick-off meeting** will take place in (Brussels), at the latest 10 days following the entry into force of the contract, in order to settle all the details of the work to be undertaken.

## 3 Evaluation and award

The evaluation is based solely on the information provided in the submitted tender. It involves the following:

- Verification of non-exclusion of tenderers on the basis of the exclusion criteria
- Selection of tenderers on the basis of selection criteria
- Verification of compliance with the minimum requirements set out in these tender specifications
- Evaluation of tenders on the basis of the award criteria

The contracting authority may reject abnormally low tenders, in particular if it established that the tenderer or a subcontractor does not comply with applicable obligations in the fields of environmental, social and labour law.

The tenders will be assessed in the order indicated above. Only tenders meeting the requirements of one step will pass on to the next step.

### 3.1 Verification of non exclusion

All tenderers must provide a declaration on honour (see Annex 2), signed and dated by an authorised representative, stating that they are not in one of the situations of exclusion listed in that declaration on honour.

In case of joint tender, each member of the group must provide a declaration on honour signed by an authorised representative.

In case of subcontracting, subcontractors whose share of the contract is above 20% and those whose capacity is necessary to fulfil the selection criteria must provide a declaration on honour signed by an authorised representative.

The successful tenderer must provide the documents mentioned as supporting evidence in the declaration on honour before signature of the contract and within a deadline given by the contracting authority. This requirement applies to each member of the group in case of joint tender, to subcontractors whose share of the contract is above 20% and to subcontractors whose capacity is necessary to fulfil the selection criteria.

The obligation to submit supporting evidence does not apply to international organisations.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit the documentary evidence if it has already been submitted for another procurement procedure and provided the documents were issued not more than one year before the date of their request by the contracting authority and are still valid at that date. In such cases, the tenderer must declare on its honour that the documentary evidence has already been provided in a previous procurement procedure, indicate the reference of the procedure and confirm that there has been no change in its situation.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit a specific document if the contracting authority can access the document in question on a national database free of charge.

### 3.2 Selection criteria

Tenderers must prove their legal, regulatory, economic, financial, technical and professional capacity to carry out the work subject to this procurement procedure.

The tenderer may rely on the capacities of other entities, regardless of the legal nature of the links which it has with them. 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 producing an undertaking on the part of those entities to place those resources at its disposal.

The tender must include the proportion of the contract that the tenderer intends to subcontract.

### **3.2.1 Declaration and evidence**

The tenderers (and each member of the group in case of joint tender) and subcontractors whose capacity is necessary to fulfil the selection criteria must provide the declaration on honour (see Annex 2), signed and dated by an authorised representative, stating that they fulfil the selection criteria applicable to them. In case of joint tender or subcontracting, the criteria applicable to the tenderer as a whole will be verified by combining the various declarations for a consolidated assessment.

This declaration is part of the declaration used for exclusion criteria (see section 4.1) so only one declaration covering both aspects should be provided by each concerned entity.

After contract award, the successful tenderer will be required to provide the evidence mentioned below before signature of the contract and within a deadline given by the contracting authority. This requirement applies to each member of the group in case of joint tender and to subcontractors whose capacity is necessary to fulfil the selection criteria.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit the documentary evidence if it has already been submitted for another procurement procedure and provided the documents were issued not more than one year before the date of their request by the contracting authority and are still valid at that date. In such cases, the tenderer must declare on its honour that the documentary evidence has already been provided in a previous procurement procedure, indicate the reference of the procedure and confirm that there has been no change in its situation.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit a specific document if the contracting authority can access the document in question on a national database free of charge.

### **3.2.2 Economic and financial capacity criteria**

The tenderer must have the necessary economic and financial capacity to perform this contract until its end. In order to prove their capacity, the tenderer must comply with the following selection criteria:

- **Criterion F1:** Annual turnover of the last two financial years above EUR 200 000. This criterion applies to the tenderer as a whole, i.e. the combined capacity of all members of a group in case of a joint tender.
- **Criterion F2:** The tenderer must have a professional risk indemnity insurance of at least EUR 150 000; this criterion applies to the leader in case of a joint tender.

#### **Evidence to be provided upon request:**

- Copy of the profit and loss accounts and balance sheet for the last two years for which accounts have been closed from each concerned legal entity;
- Failing that, appropriate statements from banks;
- Evidence of professional risk indemnity insurance.

If, for some exceptional reason which the Contracting Authority considers justified, a tenderer is unable to provide one or other of the above documents, it may prove its economic and financial capacity by any other document which the Contracting Authority considers appropriate. In any case, the Contracting Authority must at least be notified of the exceptional reason and its justification. The Commission reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity.

### 3.2.3 Technical and professional capacity criteria and evidence

#### a. Criteria relating to tenderers

Tenderers (in case of a joint tender the combined capacity of all members of the group and identified subcontractors) must comply with the criteria listed below. The project references indicated below consist in a list of relevant services provided in the past three years, with the sums, dates and clients, public or private, accompanied by statements issued by the clients.

- **Criterion A1:** The tenderer must prove experience in the field of designing and implementing international communication campaigns (preferably in the health or medical field), as well as in graphic design, production of logos, branding, copywriting, layout of publications, and production of videos.

**Evidence A1:** the tenderer must provide references and links to 3 projects delivered in these fields in the last three years with a minimum value for each project of € 100,000. The references and links should include examples of the materials produced as follows:

- At least 3 examples of videos;
- At least 3 examples of designed logos;
- Layouts of at least 3 publications (brochures, books, etc);
- Examples of social media cards produced;
- Examples of campaign messages/slogans;
- Examples of at least three infographics
- Examples of social media advertising campaigns (impact and reach).

- **Criterion A2:** The tenderer must prove capacity to work in English.

**Evidence A2:** all of the materials submitted under Evidence A1 above must be in English. The videos featured must at least have English subtitles.

#### b. Criteria relating to the team delivering the service:

The team delivering the service should include, as a minimum, the following profiles.

Evidence will consist in CVs of the team responsible to deliver the service. Each CV should indicate the intended function in the delivery of the service.

**B1 - Project Manager:** At least 10 years of experience in project management, including the design and implementation of communication campaigns (preferably in the health or medical field), overseeing project delivery, quality control of delivered service, client orientation and conflict resolution experience in project of a similar size) and coverage, with experience in management of team of at least 5 people.

**Evidence:** CV, 3 examples of projects managed

**B2 - Language quality check:** all of the members of the team should have at least C1 level in the Common European Framework for Reference for Languages<sup>2</sup> in English. The copywriter should be a native or near-native English speaker.

**Evidence:** a language certificate or past relevant experience.

**B3 - Videographer:** Relevant higher education degree or equivalent professional experience and at least 10 years of professional experience in the field.

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<sup>2</sup> See [http://www.coe.int/t/dg4/linguistic/Cadre1\\_en.asp](http://www.coe.int/t/dg4/linguistic/Cadre1_en.asp)

**Evidence:** CV, at least 3 examples of videos produced.

**B4- Copywriter/journalist:** Relevant higher education degree or equivalent professional experience and at least 8 years of professional experience in the field, including at least 3 years in science communication. Proven ability to translate complex topics into a language suitable for a lay audience.

**Evidence:** CV, at least three writing samples (campaign slogans, articles, etc).

**B5 - Graphic designer:** Relevant higher education degree or equivalent professional experience and at least 10 years of professional experience in the field.

**Evidence:** CV and a portfolio of graphic design work (include at least one example of a logo and an infographic).

**B6 – Social media expert.** Relevant higher education degree or equivalent professional experience and at least 5 years of professional experience in the field.

**Evidence:** CV and 3 examples of Twitter advertising campaigns managed.

### 3.3 Award criteria

The contract will be awarded based on the most economically advantageous tender, according to the 'best price-quality ratio' award method. The quality of the tender will be evaluated against the following criteria. The maximum total quality score is 100 points.

NO	TECHNICAL AWARD CRITERIA	MAX POINTS
1	<p><b>Concept and creative approach aiming at fulfilling the tasks outlined in the tender specifications and the overall objective of the campaign. This should include proposals on main campaign messages, the format of the videos, and how all the elements of the campaign will fit together to deliver its main messages.</b></p> <p>Sub-criterion 1.1 (max. 15 points): The quality of the proposed campaign messages (slogans);</p> <p>Sub-criterion 1.2 (max. 20 points): The quality of the proposed IMI 10<sup>th</sup> anniversary logo and visual branding of the campaign;</p> <p>Sub-criterion 1.3. (max. 20 points): The quality of the proposed concept and format for a series of short videos.</p> <p>Sub-criterion 1.4. (max. 5 points): The quality of the proposal for the Twitter advertising campaign, including key performance indicators that could be used to measure the impact of the campaign.</p>	60
2	<p><b>Organisation of the work and resources</b></p> <p>This criterion will assess how the roles and responsibilities of the proposed team and of the different economic operators (in case of joint tenders, including subcontractors if applicable) are distributed for each task. It also assesses the global allocation of time and resources to the project and to each task or deliverable, and whether this allocation is adequate for the work. The tender should provide details on the allocation of time and human resources and the rationale behind the choice of this allocation. Details should be provided as part of the technical offer. It is not a budget requested as part of the financial offer.</p>	40
	<b>TOTAL</b>	<b>100*</b>

\*Only tenders scoring **at least 75%** against each of the above two award criteria will have their financial offers assessed.

### 3.3.1 Ranking of tenders

The contract will be awarded to the most economically advantageous tender, established by weighing technical quality against price on a 60/40 basis.

The consolidated score for each tenderer will be calculated as follows:

$$\text{Consolidated score} = ( \text{Technical score} \times 0,6 ) + ( \text{Financial score} \times 0,4 )$$

\* Financial scores will be calculated as follows:

$$\text{Financial score of tender A} = \frac{\text{Price proposed by tender proposing lowest price}}{\text{Price proposed by Tenderer A}} \times 100$$

**The tender ranked first after applying the formula will be awarded the contract.**

## 4 Annexes

1. Tenderer's Identification Form
2. Declaration of honour on exclusion criteria and selection criteria
3. Power of attorney (mandate in case of joint tender)
4. Draft Contract or purchase order
5. Model Financial Offer

# Annex 1

## Identification of the tenderer

(Each service provider, including any member of a consortium or grouping and subcontractor(s) whose share of the work is more than 20% of the contract must complete and sign this identification form)

### Call for tenders IMI.2017.OP.209

Identity	
Name of the tenderer	
Legal status of the tenderer	
Date of registration	
Country of registration	
Registration number	
VAT number	
Description of statutory social security cover (at the level of the Member State of origin) and non-statutory cover (supplementary professional indemnity insurance) <sup>3</sup>	
Address	
Address of registered office of tenderer	
Where appropriate, administrative address of tenderer for the purposes of this invitation to tender	
Contact Person	
Surname: First name: Title (e.g. Dr, Mr, Ms) : Position (e.g. manager): Telephone number: Fax number: E-mail address:	

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<sup>3</sup> For natural persons.



<b>Legal Representatives</b>	
<b>Names and function of legal representatives</b> and of other representatives of the tenderer who are authorised to sign contracts with third parties	
<b>Declaration by an authorised representative of the organisation<sup>4</sup></b>	
I, the undersigned, certify that the information given in this tender is correct and that the tender is valid.	
Surname: First name:	Signature:

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<sup>4</sup> This person must be included in the list of legal representatives; otherwise the signature on the tender will be invalidated.

## Annex 2

Comments [*in grey italics in square brackets*] are to be deleted and/or replaced by appropriate information.

### Declaration of honour on exclusion criteria and selection criteria

The undersigned [*insert name of the signatory of this form*], representing:

( <i>only for natural persons</i> ) himself or herself	( <i>only for legal persons</i> ) the following legal person:
ID or passport number:	Full official name: Official legal form: Statutory registration number: Full official address: VAT registration number:

➤ declares whether the above-mentioned person is in one of the following situations or not:		
<b>SITUATION OF EXCLUSION CONCERNING THE PERSON</b>	YES	NO
a) it is bankrupt, subject to insolvency or winding up procedures, its assets are being administered by a liquidator or by a court, it is in an arrangement with creditors, its business activities are suspended or it is in any analogous situation arising from a similar procedure provided for under national legislation or regulations;	<input type="checkbox"/>	<input type="checkbox"/>
b) it has been established by a final judgement or a final administrative decision that the person is in breach of its obligations relating to the payment of taxes or social security contributions in accordance with the law of the country in which it is established, with those of the country in which the contracting authority is located or those of the country of the performance of the contract;	<input type="checkbox"/>	<input type="checkbox"/>
c) it has been established by a final judgement or a final administrative decision that the person is guilty of grave professional misconduct by having violated applicable laws or regulations or ethical standards of the profession to which the person belongs, or by having engaged in any wrongful conduct which has an impact on its professional credibility where such conduct denotes wrongful intent or gross negligence, including, in particular, any of the following:		
(i) fraudulently or negligently misrepresenting information required for the verification of the absence of grounds for exclusion or the fulfilment of selection criteria or in the performance of a contract;	<input type="checkbox"/>	<input type="checkbox"/>
(ii) entering into agreement with other persons with the aim of distorting competition;	<input type="checkbox"/>	<input type="checkbox"/>
(iii) violating intellectual property rights;	<input type="checkbox"/>	<input type="checkbox"/>
(iv) attempting to influence the decision-making process of the contracting authority during the award procedure;	<input type="checkbox"/>	<input type="checkbox"/>
(v) attempting to obtain confidential information that may confer upon it undue advantages in the award procedure;	<input type="checkbox"/>	<input type="checkbox"/>
d) it has been established by a final judgement that the person is guilty of any of the following:		
(i) fraud, within the meaning of Article 1 of the Convention on the protection of the European Communities' financial interests, drawn up by the Council Act of 26 July 1995;	<input type="checkbox"/>	<input type="checkbox"/>

(ii) corruption, as defined in Article 3 of the Convention on the fight against corruption involving officials of the European Communities or officials of EU Member States, drawn up by the Council Act of 26 May 1997, and in Article 2(1) of Council Framework Decision 2003/568/JHA, as well as corruption as defined in the legal provisions of the country where the contracting authority is located, the country in which the person is established or the country of the performance of the contract;	<input type="checkbox"/>	<input type="checkbox"/>
(iii) participation in a criminal organisation, as defined in Article 2 of Council Framework Decision 2008/841/JHA;	<input type="checkbox"/>	<input type="checkbox"/>
iv) money laundering or terrorist financing, as defined in Article 1 of Directive 2005/60/EC of the European Parliament and of the Council;	<input type="checkbox"/>	<input type="checkbox"/>
(v) terrorist-related offences or offences linked to terrorist activities, as defined in Articles 1 and 3 of Council Framework Decision 2002/475/JHA, respectively, or inciting, aiding, abetting or attempting to commit such offences, as referred to in Article 4 of that Decision;	<input type="checkbox"/>	<input type="checkbox"/>
(vi) child labour or other forms of trafficking in human beings as defined in Article 2 of Directive 2011/36/EU of the European Parliament and of the Council;	<input type="checkbox"/>	<input type="checkbox"/>
e) the person has shown significant deficiencies in complying with the main obligations in the performance of a contract financed by the Union's budget, which has led to its early termination or to the application of liquidated damages or other contractual penalties, or which has been discovered following checks, audits or investigations by an Authorising Officer, OLAF or the Court of Auditors;	<input type="checkbox"/>	<input type="checkbox"/>
f) it has been established by a final judgment or final administrative decision that the person has committed an irregularity within the meaning of Article 1(2) of Council Regulation (EC, Euratom) No 2988/95;	<input type="checkbox"/>	<input type="checkbox"/>
g) for the situations of grave professional misconduct, fraud, corruption, other criminal offences, significant deficiencies in the performance of the contract or irregularity, the applicant is subject to: <ul style="list-style-type: none"> <li>i. facts established in the context of audits or investigations carried out by the Court of Auditors, OLAF or internal audit, or any other check, audit or control performed under the responsibility of an authorising officer of an EU institution, of a European office or of an EU agency or body;</li> <li>ii. non-final administrative decisions which may include disciplinary measures taken by the competent supervisory body responsible for the verification of the application of standards of professional ethics;</li> <li>iii. decisions of the ECB, the EIB, the European Investment Fund or international organisations;</li> <li>iv. decisions of the Commission relating to the infringement of the Union's competition rules or of a national competent authority relating to the infringement of Union or national competition law; or</li> <li>v. decisions of exclusion by an authorising officer of an EU institution, of a European office or of an EU agency or body.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>

**[Only for legal persons other than Member States and local authorities, otherwise delete this table]**

- declares whether a natural person who is a member of the administrative, management or supervisory body of the above-mentioned legal person, or who has powers of representation, decision or control with regard to the above-mentioned legal person (this covers the company directors, members of the management or supervisory bodies, and cases where one natural person holds a majority of shares) is in one of the following situations or not:

<b>SITUATIONS OF EXCLUSION CONCERNING NATURAL PERSONS WITH POWER OF REPRESENTATION, DECISION-MAKING OR CONTROL OVER THE LEGAL PERSON</b>	<b>YES</b>	<b>NO</b>
Situation (c) above (grave professional misconduct)	<input type="checkbox"/>	<input type="checkbox"/>
Situation (d) above (fraud, corruption or other criminal offence)	<input type="checkbox"/>	<input type="checkbox"/>

Situation (e) above (significant deficiencies in performance of a contract )	<input type="checkbox"/>	<input type="checkbox"/>
Situation (f) above (irregularity)	<input type="checkbox"/>	<input type="checkbox"/>

➤ declares whether a natural or legal person that assumes unlimited liability for the debts of the above-mentioned legal person is in one of the following situations or not:			
<b>SITUATIONS OF EXCLUSION CONCERNING NATURAL OR LEGAL PERSONS ASSUMING UNLIMITED LIABILITY FOR THE DEBTS OF THE LEGAL PERSON</b>	YES	NO	N/A
Situation (a) above (bankruptcy)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Situation (b) above (breach in payment of taxes or social security contributions)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

➤ declares whether the above-mentioned person is in one of the following situations or not:		
<b>GROUND FOR REJECTION FROM THIS PROCEDURE</b>	YES	NO
h) has not distorted competition by being previously involved in the preparation of procurement documents for this procurement procedure;	<input type="checkbox"/>	<input type="checkbox"/>
i) has provided accurate, sincere and complete information to the contracting authority within the context of this procurement procedure;	<input type="checkbox"/>	<input type="checkbox"/>
➤ acknowledges that the above-mentioned person may be subject to rejection from this procedure and to administrative sanctions (exclusion or financial penalty) if any of the declarations or information provided as a condition for participating in this procedure prove to be false.		

#### REMEDIAL MEASURES

If the person declares one of the situations of exclusion listed above, it should indicate the measures it has taken to remedy the exclusion situation, thus demonstrating its reliability. They may include e.g. technical, organisational and personnel measures to prevent further occurrence, compensation of damage or payment of fines. The relevant documentary evidence which appropriately illustrates the remedial measures taken should be provided in annex to this declaration. This does not apply for the situations referred in point (d) of this declaration.

#### EVIDENCE UPON REQUEST

Upon request and within the time limit set by the contracting authority the person shall provide information on the persons that are members of the administrative, management or supervisory body, as well as the following evidence concerning the person or the natural or legal persons which assume unlimited liability for the debt of the person:

For situations described in (a), (c), (d) or (f), production of a recent extract from the judicial record is required or, failing that, an equivalent document recently issued by a judicial or administrative authority in the country of establishment of the person showing that those requirements are satisfied.

For the situation described in point (a) or (b), production of recent certificates issued by the competent authorities of the State concerned are required. These documents must provide evidence covering all taxes and social security contributions for which the person is liable, including for example, VAT, income tax (natural persons only), company tax (legal persons only) and social security contributions. Where any document described above is not issued in the country concerned, it may be replaced by a sworn statement made before a judicial authority or notary or, failing that, a solemn statement made before an administrative authority or a qualified professional body in its country of establishment.

If the person already submitted such evidence for the purpose of another procedure, its issuing date does not exceed one year and it is still valid, the person shall declare on its honour that the documentary evidence has already been provided and confirm that no changes have occurred in its situation.

➤ declares whether the above-mentioned person complies with the selection criteria as provided in the tender specifications:		
<b>SELECTION CRITERIA</b>	YES	NO
(a) It fulfills the applicable economic and financial criteria indicated in section [ <i>insert</i> ] of the tender specifications;	<input type="checkbox"/>	<input type="checkbox"/>
(b) It fulfills the applicable technical and professional criteria indicated in section [ <i>insert</i> ] of the tender specifications.	<input type="checkbox"/>	<input type="checkbox"/>
➤ declares that the above-mentioned person will be able to provide the necessary supporting documents listed in the relevant sections of the tender specifications and which are not available electronically upon request and without delay.		

Full name

Date

Signature

## Annex 3

### Power of attorney

**mandating one of the partners in a joint tender as lead partner and lead contractor<sup>5</sup>**

The undersigned:

- Signatory (Name, Function, Company, Registered address, VAT Number)

having the legal capacity required to act on behalf of his/her company,

HEREBY AGREES TO THE FOLLOWING:

- 1) To submit a tender as a partner in the group of partners constituted by Company 1, Company 2, Company N, and led by Company X, in accordance with the conditions specified in the tender specifications and the terms specified in the tender to which this power of attorney is attached.
- 2) If the European Commission awards the Contract to the group of partners constituted by Company 1, Company 2, Company N, and led by Company X on the basis of the joint tender to which this power of attorney is attached, all the partners shall be co-signatories of the Contract in accordance with the following conditions:
  - (a) All partners shall be jointly and severally liable towards the European Commission for the performance of the Contract.
  - (b) All partners shall comply with the terms and conditions of the Contract and ensure the proper delivery of their respective share of the services and/or supplies subject to the Contract.
- 1) Payments by the European Commission related to the services and/or supplies subject to the Contract shall be made through the lead partner's bank account: [Provide details on bank, address, account number].
- 2) The partners grant to the lead partner all the necessary powers to act on their behalf in the submission of the tender and conclusion of the Contract, including:
  - (a) The lead partner shall submit the tender on behalf of the group of partners.
  - (b) The lead partner shall sign any contractual documents — including the Contract, and Amendments thereto — and issue any invoices related to the Services on behalf of the group of partners.
  - (c) The lead partner shall act as a single contact point with the European Commission in the delivery of the services and/or supplies subject to the Contract. It shall co-ordinate the delivery of the services and/or supplies by the group of partners to the European Commission, and shall see to a proper administration of the Contract.

Any modification to the present power of attorney shall be subject to the European Commission's express approval. This power of attorney shall expire when all the contractual obligations of the group of partners towards the European Commission for the delivery of the services and/or supplies subject to the Contract have ceased to exist. The parties cannot terminate it before that date without the Commission's consent.

Signed in ..... on [dd/mm/yyyy]

Place and date:

Name (in capital letters), function, company and signature:

<sup>5</sup> To be filled in and signed by each partner in a joint tender except the lead partner.

## **Annex 4**

**Draft contract**

**Please see separate document**

## **Annex 5**

### **Model Financial Offer**

**Please see separate document**



