



TENDER SPECIFICATIONS EU-OSHA/2017/OP/F/SE/0032

‘Design, layout and production of printed, online, audio-visual
and exhibition materials’

Type of procedure: open procedure

Type of contract: framework contract

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Tender documents are available for download at:

<https://osha.europa.eu/en/about-eu-osha/procurement>

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1 Introduction

1.1 The European Agency for Safety and Health at Work

The European Agency for Safety and Health at Work (EU-OSHA) is an agency of the European Union (EU) and one of the decentralised community bodies. Its central role is to contribute to the promotion of safer, healthier and more productive workplaces by developing, analysing and disseminating information on occupational safety and health (OSH).

As a tripartite organisation, EU-OSHA works closely with governments and employers' and workers' representatives to share good practice and to reach workers and workplaces across Europe.

EU-OSHA's main safety and health information network is made up of focal points in all EU Member States and candidate, potential candidate and European Free Trade Area countries (https://osha.europa.eu/en/about/organisation/focal_points). A country's Focal point is normally the national OSH authority; the focal points represent EU-OSHA and support its activities, such as the Healthy Workplaces Campaign.

Located in Bilbao, Spain, EU-OSHA has a dedicated staff of communication and safety and health specialists and a network of partners in all Member States and beyond. As well as running Europe-wide information campaigns, EU-OSHA also publishes scientific research in print and online media.

1.2 Background specific to this call for tender

Communication, campaigning and promotion are the core activities of the Communication and Promotion Unit at EU-OSHA, which is the unit responsible for this call.

The two-year *Healthy Workplaces Campaigns* are coordinated by EU-OSHA and its network partners in the EU Member States and beyond. The campaigns, which are now the largest of its kind in the world, have already seen record levels of involvement with hundreds of events and activities organised at the national and European level.

To run its campaigns and raise awareness on OSH, EU-OSHA produces a range of printed, online and audio-visual materials: reports, information sheets, guides, posters, leaflets, flyers, infographics, videos, DVDs and exhibition materials; many of them are produced in 25 European languages.

All publications are available from the website (<http://osha.europa.eu/en/publications>), helping to bring in-depth and topical safety and health information to a wide range of audiences across Europe.

Other examples of materials can be found in the campaign website (<https://healthy-workplaces.eu/en/campaign-materials>) under the "Tool and publications" section.

More information on EU-OSHA and its activities can be found at: <http://osha.europa.eu>.



1.3 Time schedule for this tender

Task	Date	Comments
Dispatch date	11/05/2017	Contract notice sent to Official Journal
Deadline for request of clarifications from EU-OSHA (6 working days before deadline)	14/06/2017	https://osha.europa.eu/en/about-eu-osha/procurement
Deadline for submission of tenders	23/06/2017	See invitation to tender for details
Opening session (public)	30/06/2017	11:00
Date for evaluation of tenders	July 2017	Estimated
Notification of award to tenderers	July 2017	Estimated
Framework contract signature	Sept 2017	Estimated

1.4 Estimated volume

The tenders must not exceed the maximum estimated budget of 250,000 euros/year (total amount of 1,000,000 for 4 years).

2 Description of the requested tasks and services

Graphic design and layout

- Development and implementation of branding strategies
- Development of visual identity strategies
- Graphic design for print, online and audio-visual materials
- Layout services
- Consultancy and induction for related services and products

Production

- Audio-visual materials
- Local video production
- Small-scale printing services
- Exhibition materials

The selected contractor must be flexible enough to carry out different projects or tasks simultaneously since different needs may arise at the same time or there may be a reprioritisation of tasks.

2.1 Graphic design and layout

2.1.1 *Development and implementation of branding strategies*

The contractor should be able to develop or update graphic design manuals (corporate and campaign guidelines). This includes instructions on the correct use of logos, typography, colours, images, symbols, templates, formatting, stationery, glossary etc. It may also include the development or refresh of corporate or campaign-related logos, adapting EU-OSHA's corporate design to new standards and amending templates accordingly.

These graphic design manuals should be concise, coherent and easy to use and include examples of how design guidelines are to be applied in different media.

The manual should be delivered in electronic format (pdf) containing bookmarks.

Delivery of final artwork files (InDesign or equivalent containing all links and objects) should be done by electronic file transfer.

EU-OSHA's current corporate design manual is contained in Annex X.

2.1.2 *Development and implementation of visual identity strategies*

The contractor is expected to develop visual identities for particular campaigns, communication projects, events and sets of printed, online and audio-visual products including websites, e-guides or data visualization tools.

The contractor should create a strong and coherent identity to facilitate the recognition of EU-OSHA and its publications and products and increase the impact of its messages.



The creation process includes the presentation of three initial proposals and the application of the chosen proposal to several products across different media. For this, mock-ups should be included in the tender.

The contractor is required to regularly propose and implement new ideas in line with EU-OSHA's established brand, its evolution and market trends.

Delivery of final artwork files (InDesign or equivalent containing all links and objects) should be done by electronic file transfer.

2.1.3 Graphic design for print, online and audio-visual materials

The contractor will be required to develop and design new concepts and templates for products or campaigns on paper, electronic, cross-media or any other support and for use with any means of communication.

Graphic design and development services include:

- Definition of basic concept(s) for covers and inner pages according to EU-OSHA's guidelines and briefings
- Designing and producing new products such as guides, brochures, posters, flyers, banners, infographics, videos etc.
- Creation of presentations in PPT, or any other relevant software for presentations
- Development of templates for graphic design and desktop publishing
- Image search, selection, manipulations and supply/purchase of photos, graphs, drawings, video, illustrations, video sequences or any type of sources files to serve EU-OSHA's needs in the areas of communication, reporting, archiving, etc.
- Developing and implementing illustrations, graphs, pictures, infographics etc.
- Preparing artwork
- Adaptation of existing designs (format)

The products and services described above have been provided by way of example and are not exhaustive. EU-OSHA may request graphic design related services not specifically mentioned in these Technical Specifications.

There will be no reimbursement for font usage. Please consult font families used by EU-OSHA as described in the EU OSHA corporate design manual (see Annex X). In the event that specific font sets will have to be acquired for a specific design concept, this will be done on an ad-hoc basis provided that this was expressly requested or pre-approved by EU-OSHA.

For every service or design concept the tenderer shall provide electronic proofs (print proofs on request) and organise improvement rounds, depending on the content and language of the document.

The designs shall be implemented in Adobe InDesign or equivalent graphic design applications file formats requested by EU-OSHA.

Templates for desktop publishing shall be developed for current and future versions of MSOffice.

The contractor must handle graphic design in accordance with EU-OSHA's corporate identity, style guidelines and design concepts, as instructed, while at the same time being prepared to suggest creative innovations.



The work requested may be limited to the delivery of a template that will then be used by another contractor to finalise the production or it may continue with the layout and the production of the whole product in one or several language versions.

Delivery of final artwork files (InDesign, Adobe Premiere, AVI, VLC media file, MP4 Video, or any equivalent formats, with subtitles in srt or equivalent containing all links and objects) should be done by electronic file transfer.

2.1.4 *Layout services*

Layout services involve the creation of ready-to-print files from files delivered by EU-OSHA in different formats. An increasing number of products are designed only for the web whereas others will be printed.

This work comprises:

- Text composition
- Insertion and processing of illustrations, photos, graphical charts and tables on the basis of data supplied
- Page layout
- Quality control (technical, completeness)
- Submission of proofs
- Author's corrections
- Preparation of web pdfs containing bookmarks and destinations
- Preparation of print-ready files
- Delivery of final artwork by electronic file transfer.

The tenderer shall be able to offer layout and production services in all current and any possible future official languages of the European Union, as well as Norwegian and Icelandic and the languages of the current and potential candidate countries.

The tenderer must show a proven capacity to work with multilingual content and also the ability to provide simultaneous layout in several languages, making the necessary adaptations, and must possess the appropriate fonts for all language groups.

For every document – in each language version to be produced – the tenderer shall provide proof prints and organise correction rounds, depending on the content and the language of the document.

For every document – in each language version to be developed – the tenderer shall provide an archive containing the complete collection of electronic files, open files, primary and supporting archives (images etc.) including a section containing all files needed for a reprint exercise.

2.1.5 *Consultancy and induction for related services and products*

The contractor should be able to provide technical advice and induction sessions in the areas described above. This includes advice in the area of cross-media and digital publishing (e-books, html publications, presentations etc.), new media applications and graphic design programmes such as InDesign, Illustrator, Photoshop, Adobe Premiere etc.



2.2 Production

2.2.1 *Audio-visual material*

EU-OSHA aims to increase its corporate visibility and the effectiveness of its initiatives through the creation of various digital and multimedia products. These shall complement and streamline EU-OSHA's on-going communication and promotional efforts by engaging EU-OSHA's diverse audiences and generating new interest.

The work envisaged involves the provision of high-quality professional services in the following area of activity:

Production of digital/multimedia products

The work may include, but is not limited to, the following:

- development of original concepts, script ideas, storyboards and scenarios, animated infographics or animations (2D or 3D) for audio-visual productions compatible with the web;
- recording of raw audio-visual and audio material, as well as transformation of such material to edited products;
- production of videos, short videos and video clips: documentaries, interviews, reportages, etc.; promotional clips and other products specifically designed for mobile phone applications;
- animated presentations: for instance, PPTs, Prezi;
- subtitling and dubbing of videos in 25 languages;
- subtitling of films (1 per year) in 25 languages and production of DVDs
- other web-based or non-web-based multimedia products including a variety of niche and/or emerging multimedia products for on- and offline communications. This could include transformation of written content into web-based or non-web-based multimedia formats, for example advanced presentations softwares, or other available technologies, according to industry standards.
- Delivery of final artwork files (InDesign, Adobe Premiere, AVI, VLC media file, MP4 Video, or any equivalent formats, with subtitles in srt or equivalent containing all links and objects) should be done by electronic file transfer.
- The contractor must handle graphic design in accordance with EU-OSHA's corporate identity, style guidelines and design concepts, as instructed, while at the same time being prepared to suggest creative innovations.

2.2.2 *Local video production*

The contractor should be able to provide facilities in the Bilbao area and/or to facilitate filming crew to record video messages for events, short video clips or ad-hoc recordings.

The contractor should be able to edit these videos and deliver edited videos in a relevant format available for screening.

2.2.3 *Small scale printing services*

EU-OSHA will contract large-scale offset printing services out to the Publications Office of the European Union in Luxembourg.

However, the contractor should be able to offer ad-hoc small scale digital printing services to cater for special needs.

The scope of the required services is expected to include event-related promotion material, high-quality prints on special papers, and digital printing on different surfaces and material.



Products should be delivered either to EU-OSHA's offices in Bilbao or to its partners in Europe.

2.2.4 *Exhibition material*

The service provider should provide high quality professional services in the following areas of activity:

- Production of mobile exhibition material
- Printing on different surfaces
- Delivery to one central storage point in Europe

The tenderer shall be able to provide EU-OSHA with a wide range of mobile exhibition material. The following list constitutes those items that will most likely be ordered by EU-OSHA throughout the duration of the contract. The list is not exhaustive.

- Pop-up displays
- Roll-up banner stands
- Modular display stands

Catalogue: The tenderer shall provide to EU-OSHA a product catalogue of standard mobile exhibition material containing at least all items mentioned above, but also other related material contained in the tenderer's portfolio. The catalogue should present different models, prices, delivery time and warranty.

Other material not on the above list may be ordered from the catalogue of the winning tenderer. Alternatively, other items which are neither in the list nor in the catalogue may be required on an ad-hoc basis. In this case a detailed price quotation will be requested.

Qualitative and quantitative requirements

All produced items and material must meet European Union quality and safety standards which include - but are not limited to - colour, finishing and clear and legible prints.

The contractor should advise EU-OSHA which items need to be CE labelled individually.

EU-OSHA reserves the right to return any products that are not fulfilling EU safety and quality standards or which are not properly labelled.

The items must have a manufacturer's warranty. The items must be easy to handle and user-friendly.

2.3 Estimated workload

The average quantities per year can be roughly broken down as follows:

Graphic design and layout

Category	Percentage of workload
Branding and visual identities	15%
Graphic design	65%
Layout	18%
Consultancy and induction	2%



Production

Product	Quantity
Videos	3
Subtitling of films and production of DVDs	1
Infographics	5
Local video production	2
Small scale printing services	10,000 printed copies
Pop-up displays	20
Roll-up banner stands	60
Modular display stands	2

2.4 Workflows

In order to ensure efficient completion of the project and to be able to properly monitor, assess, and supervise the contractor's progress in execution of the tasks with respect to the tender specifications, EU-OSHA will designate a project manager. This person will be responsible for the overall management of the contract, monitoring of the coordination and project management, day-to-day administration of the contract, ensuring fulfilment of tasks.

The tenderer will also set up a management structure and appoint a project manager whose main task is to manage the project effectively. The management structure is to ensure that effective methods for planning, communicating, and decision making are in place; that the project's progress is monitored and the work is performed on schedule; that deliverables are delivered on time; and that the project objectives and outcomes are achieved. Among their tasks, the project manager should be responsible of the quality control of the work performed, manage communication within the project and maintain contact with EU-OSHA concerning the project as a whole.

In their tender, tenderers must specify the allocation of project responsibilities that will allow effective management and efficient coordination of all services. Furthermore, the tenderer must provide details of the timetables for carrying out the services, submitting the deliverables, etc.

For large projects a kick-off meeting or video conference may be organised between the contractor and EU-OSHA.

For all developments, the tenderer shall take into account EU-OSHA's existing corporate or campaign design manuals.

Draft documents, briefings and background information are delivered in English by EU-OSHA to the contractor mainly in Microsoft Word format, pdf or equivalent. Graphical elements and artwork will be provided by EU-OSHA in vector graphic format.



Draft designs should be delivered by the contractor in formats readable by standard PC programmes such as Adobe pdf within the agreed timeframe.

In the case where physical material has to be exchanged between the contractor and the EU-OSHA (i.e. drafts, films, proofs) the sender will bear the costs.

For every service or design concept the contractor shall provide electronic proofs (print proofs on request) and organise two to three improvement rounds, depending on the amount of design work involved.

Once a design concept and layouts have been developed and agreed on for the single products, the contractor shall prepare camera ready files, films, appropriate files for the specific printing and finishing phase.

The contractor should liaise with third parties (Publications Office of the European Union, printers, producers, web designers).

For every service or design concept - in each language version (if applicable) - the tenderer shall provide an archive in electronic format containing for each language version the complete collection of electronic files, open files, primary and supporting archives (images etc.) including a section containing all files needed for a reprint exercise.



3 General requirements of the framework contract

For its organisation and functioning, EU-OSHA is in constant need of goods and services. Tendering is the structured way to consult the market for the purchase of these goods and services.

The purpose of competitive tendering for awarding contracts is twofold:

- to ensure the transparency of operations;
- to obtain the desired quality of services, supplies and works at the best possible price.

The applicable regulations, namely Directive 2014/24/EU and Regulations No 966/2012 (European Parliament and Council) and No 1268/2012 (European Commission) as amended by Regulation No 2015/1929 (European Parliament and Council), oblige EU-OSHA to guarantee the widest possible participation, on equal terms, in tender procedures and contracts.

3.1 Social, labour and human aspects

Tenderers should fulfil and be able to document/report on all obligations derived from the OSH Framework Directive (Council Directive 89/391/EEC) on the introduction of measures to encourage improvements in the safety and health at work, and the corresponding transposition into their country's national law.

EU-OSHA, as a European public institution, pays special attention to the protection of social, labour and human rights.

In line with this, the Contractor tenderer shall comply with the European and/or national law in force applicable in these fields covering, among other issues, equal employment opportunities, and the labour market integration of persons with disabilities, the prohibition of child labour and the protection of young people's employment.

Please also refer to Article II.4.3. of the Model of Framework Contract.

3.2 Environmental aspects

EU-OSHA, as per its commitment to ensuring health and safety in general and at work in particular, pays special attention to the protection of the environment and of people.

To this end, EU-OSHA's objective is the purchase of goods, services and works that have a reduced impact on the environment throughout their life cycle in comparison with other goods, services and works with identical primary function.

In this context and within the framework of this call for tender, the tenderer shall comply with the European and/or national law in force in these fields.

Please also refer to Article II.4.3. of the Model of Framework Contract.

The products, equipment and supplies that the Contractor shall allocate to the provision of the services requested shall be, wherever possible, green/biodegradable/recycled, with the least possible impact on the environment and human health in accordance with the European and/or national law in force, and shall contribute to a high standard quality achievement in the provision of these services.

In addition, the contractor shall train the staff assigned to the provision of the services requested on how to carry out their tasks in a responsible and efficient way for human health and environment.



3.3 Participation in this tender

Participation in procurement procedures shall be open on equal terms to all natural and legal persons within the scope of the Treaties and to all natural and legal persons established in a third country that has a special agreement with the EU in the field of public procurement under the conditions laid down in that agreement. It shall also be open to international organisations.

EU-OSHA's Financial Regulation¹, guarantees participation for all tenderers on equal terms.

In order to ensure consistency with all EU-OSHA communication activities, the successful tenderer may be requested — whenever necessary — to work together effectively with the current and new contractors involved in the development of EU-OSHA activities.

Finally, contractors will be required to sign a declaration of confidentiality and no conflict of interest (see Annex XV for information).

3.4 Contractual approach of this tender

Through this call for tender EU-OSHA intends to establish a **framework contract** with a specialised external contractor for a period **of 4 years**.

The framework contract will be concluded between EU-OSHA and the successful tenderer for an initial period **of 1 year** from the date it is signed by EU-OSHA. Unless terminated by either party by registered letter not later than two months before it expires, the contract may be extended automatically for three successive periods of 1 year, on the understanding that thereafter no further automatic extension will be possible.

The submission of a tender implies acceptance of the terms and conditions specified in the draft framework contract, including the 'General terms and conditions applicable to contracts', and all provisions laid down in these specifications, annexes and, where applicable, additional documents.

A framework contract places reciprocal obligations on both parties with regard to those elements which are unalterably and unequivocally established when the contract is concluded, such as price (including revision rules), subject, basic performance conditions and duration, administrative and technical provisions, applicable during its validity period.

The framework contract will include the tasks and services described in the specifications for tender. The bid will form an integral part of the contract, as will these specifications.

The contractor must ensure that all the services provided are delivered free of rights including copyright and other intellectual or industrial property rights (see Model of Framework contract, Article I.10).

For the entire duration of the framework contract, the contractor must provide sufficient resources to guarantee the stability of the service offered and the quality of the supplies necessary for proper performance of the specific agreements.

The framework contract imposes no obligation on EU-OSHA to call on the services of the contractor. Only the implementation of the framework contract through *specific contracts* is binding on EU-OSHA.

¹ Available at <https://osha.europa.eu/en/about-eu-osha/what-we-do/how-we-work/finance>



3.5 Implementation of the framework contract

As the precise quantities and times for deliveries or performance cannot be determined in advance, tasks are to be carried out on the basis of specific contracts drawn up by EU-OSHA after consultation with the contractor and consistent with the financial offer. The process of request for services until the final offer will take the form of an exchange of correspondence between EU-OSHA and the contractor to define the concrete tasks, precise dimension and budget implications of the request, due to the complexity of services. Once EU-OSHA and the contractor have come to an agreement within the limits of terms laid down in the framework contract, EU-OSHA will issue the specific contract.

Within 10 working days of a specific contract being sent by EU-OSHA to the contractor, EU-OSHA should receive it back, duly signed and dated. The period allowed for the execution of the task shall start to run from the date on which the last party signs the specific contract.

Contractual progress reports will be requested as stated in the section 2.4 and in the model of Framework Contract.

In accordance with Article II.24 of the draft framework contract, an audit of the contractor's compliance with their contractual obligations may be carried out by EU-OSHA at the end of the framework contract.

A sample of a **specific contract** can be found in annex to the model of Framework Contract for information.

A kick-off meeting to review all contractual matters will be organised between the contractor and EU-OSHA after signature of the framework contract at EU-OSHA's offices in Bilbao, Spain. During this meeting, EU-OSHA will provide a 1 day's kick-off meeting for the key staff identified. All these persons must be the same as those proposed in the tender and all expenses will be borne by the tenderer (including travel and accommodation costs, per diems and staff fees).

For other meetings, the conditions of payment will apply according to Article 1.5 of the Framework Contract.

The contractor will not be able to replace the staff described in the tender without explicit authorisation from EU-OSHA for the whole duration of the contract. EU-OSHA may reject any CV considered inadequate.

3.6 Terms of payment

With respect to the specific contracts signed under the framework contract, payments will be made against acceptance by EU-OSHA of agreed deliverables and provision of the necessary supporting documentation and reports as indicated in the model of framework contract in Article I.6.

3.7 Communication between EU-OSHA and the tenderer

Any contact between the contracting department and the tenderer during the procedure is forbidden, save in exceptional circumstances and under the conditions described in the invitation to tender (section 9).

3.8 Submission of a tender by a consortium of companies



Joint tenders from consortia of providers are permitted. 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 tenders, all members of the group assume joint and several liability towards EU-OSHA 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 single point of contact (the leader) for administrative and financial aspects as well as operational management of the contract.

A consortium can be a permanent legally established grouping or a grouping which has been constituted for this tender procedure.

Tenders from consortia of firms or groups of providers, contractors or suppliers must specify the role, the qualifications and experience of each member of the group.

Each member of the consortium must be eligible in accordance with the exclusion criteria in section [5.2.3 - Exclusion criteria](#) and provide the required evidence. In addition, members must be capable of performing the contract in accordance with the selection criteria in section [5.2.4 - Selection criteria](#) and complete Annex VI (Consortium form).

Tenders must include the means of control provided by the incorporation law of the constituent legal entities. If the consortium is not already legally established, in the event of a joint tender being awarded the contract, EU-OSHA may require the tenderers to give a formal status to the proposed association before the contract is signed.

See additional information in section [5.2 - Evaluation of the tenders](#).

3.9 Subcontracting

Subcontracting is permitted subject to approval by EU-OSHA, but the contractor will retain full liability towards the EU-OSHA for performance of the contract as a whole. EU-OSHA may give approval either by accepting the tenderer's offer, or by prior written approval, if proposed by the tenderer after contract signature.

The tenderer must indicate clearly which parts of the work will be subcontracted. The total value of the subcontracted part of the services cannot represent the total value of the contract. All subcontractors, covering 25% of the work or more, must satisfy all criteria applicable to the award of the contract.

If the identity of the intended subcontractor(s) is already known at the time of submitting the tender, **all subcontractors, covering 25% of the work or more, must provide the required evidence for the exclusion and selection criteria** (sections [5.2.3 - Exclusion criteria](#) and [5.2.4 - Selection criteria](#) and complete Annex VII (Subcontracting form).

If the identity of the contractor(s) is not known at the time of submitting the tender, the tenderer who is awarded the contract must seek EU-OSHA's prior written authorisation before entering into a subcontract. Where no subcontractor is given, the work will be assumed to be carried out directly by the tenderer.

3.10 Confidentiality and public access to documents

All documents submitted by the tenderer become property of EU-OSHA and are deemed confidential.



In the general implementation of its activities and for the processing of tendering procedures in particular, EU-OSHA observes EU regulations as described in the invitation to tender (section 14 and 15).

Regarding public access to documents EU-OSHA applies the EU Council regulation 1049/2001 of 30 May 2001.

3.11 Price

Prices must be quoted in euros, and this applies also to tenderers from countries which are not part of the Eurozone, using the conversion rates published in the C series of the Official Journal of the European Union on the day when the invitation to tender was issued (see http://ec.europa.eu/budget/contracts_grants/info_contracts/inforeuro/index_fr.cfm).

For tenderers in such countries, the price quoted may not be revised in line with exchange-rate movements and the tenderer accepts the risks or benefits of any fluctuations.

Prices should be quoted free of all duties, taxes and other charges, (i.e. also free of value-added tax (VAT)), as EU-OSHA is exempt from such charges in the EU under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities of 8 April 1965 (OJ L 152, 13 July 1967).

For those countries where national legislation provides an exemption by means of a reimbursement, the amount of VAT must be shown separately. In case of doubt about the applicable VAT system, it is the tenderer's responsibility to contact relevant national authorities to clarify the way in which the European Community is exempt from VAT.

EU-OSHA will not reimburse expenses incurred in preparing and submitting tenders. EU-OSHA will not reimburse expenses incurred in attending opening sessions.

3.12 Additional important information

The tenderer shall be bound by the submitted tender for a period of six months following the closing date for submission. The successful tenderer must maintain this tender for a further 90 days from the date of notification of the award.

Completing the adjudication or the procedure of the call for tenders in no way imposes on EU-OSHA an obligation to award the contract. EU-OSHA shall not be liable for any compensation with respect to tenderers whose tenders have not been accepted, nor shall EU-OSHA be liable when deciding not to award the contract. This decision must be substantiated and the tenderers notified.

EU-OSHA's contractual obligation commences only upon signature of the framework contract with the successful tenderer.

In case of doubt over interpretation of tender documents, the original English language version prevails.



4 Content and presentation of the tender

Tenderers are expected to examine carefully and respect all instructions and standard formats contained in these tender specifications.

The tender must be presented with continuous page numbering on part B, so that it constitutes a coherent whole. As tenderer will be judged on the content of their tenders, these must clearly demonstrate that the tenderer is capable of carrying out the work.

Tenders must be submitted in one of the official languages of the European Union. In order to ease and speed up the evaluation, English is the preferred language for submission.

The tender should be signed by the legal representative and be perfectly legible in order to rule out any ambiguity.

All tenders must consist of the following parts:

- Part A: Administrative part and supporting documentation
- Part B: Technical offer
- Part C: Financial offer

4.1 Part A — Administrative part and supporting documentation

The supporting documentation is an important part of the tender.

The administrative part must contain all the information and documents required by the contracting authority for the evaluation of tenderers and, in particular, the following documents:

- Checklist (Annex I)
- **Declaration of honour for exclusion and selection criteria** (Annex II)
- **Legal Entity Form** including all documents required by this form (Annex III)
- **Financial Identification Form** including all documents required by this form (Annex IV)
- Tenderer's administrative information including a power of attorney (Annex V)
- If applicable, the **Consortium form** (Annex VI)
- If applicable, the **Subcontracting form** (Annex VII)
- **Supporting documents for the selection criteria** (all documentation requested in section 5.2.4 - Selection criteria)

4.2 Part B — technical offer

This section is of great importance in the evaluation of the tenders, the award of the contract and the future execution of any resulting contracts. The technical offer must meet all the specifications set out in the award criteria. Tenders must be specific and realistic while remaining clear and concise, in terms of both content and presentation.

The technical offer must be presented in a paper version and in an electronic version (USB memory stick or equivalent).



The technical offer will be assessed against the criteria set out in section 5.2.1 -Technical evaluation.

4.2.1 **Project management, quality assurance and quality of service**

Tenderers must provide a detailed and factual document of **5000 words (approximately 12 pages)**, presenting the tenderer's approach to **project management**, **quality assurance** and **quality of service** with regards to the scope of this call for tender.

The document should cover the following:

1. Method or approach proposed to ensure the ability to respond professionally and in a timely manner to any type of requests for services described in this call for tender;
2. Mechanisms for providing sufficient and qualified resource to guarantee the stability of the services offered and the quality of the services necessary for proper performance of the contract; mechanisms to accommodate peak loads;
3. Mechanisms for ensuring quality control of work performed;
4. Continuous improvement plans.

Tenderers are requested to provide the information covering all the aspects included in this call for tender, but avoiding long documents including additional elements. Clarity and conciseness will be highly appreciated.

4.2.2 **Scenarios**

Tenderers must also present their ability to perform the tasks mentioned in this call for tender by means of scenarios development.

Tenderers are requested to develop the two scenarios and in accordance with EU-OSHA's corporate design manual in Annex X.

Scenario 1: Visual identity

Scenario 2: Teaser video

The turnaround time to complete the project described in each scenario should be clearly stated within each scenario. The turnaround time is the time elapsed between starting a particular job and final delivery to EU-OSHA.

Tenderers shall develop all scenarios

All requested samples must be provided. Failure to provide any samples as requested will result in no points being allocated for the missing samples.

In addition to paper copies, mock-ups and design concepts should also be provided in digital format (USB-stick or equivalent) which should be put in envelope B. EU-OSHA cannot be considered liable in case the content cannot be accessed or read.

Scenario 1: Visual identity

For this scenario, the tenderer is requested to develop a visual concept for **EU-OSHA's Healthy Workplaces Campaign: Musculoskeletal Disorders (MSDs)**.



The concept should illustrate the overall look and feel of the campaign branding and include examples of how the branding is applied to campaign publications and products (print and online).

Dummy texts and royalty-free pictures and illustrations should be used to develop this scenario.

Corporate and campaign logos can be found in annexes XII to XIV and the corporate design manual in Annex X.

All campaign products will be translated and designs should allow for an increase in text volume of up to 20%.

Colours and the main graphic elements should work well online too.

Background

The Healthy Workplaces Campaigns are our flagship awareness-raising activity. They are the main way of getting our message to workplaces across Europe.

The Healthy Workplaces Campaigns message is — **Safety and health at work is everyone's concern. It's good for you. It's good for business.**

The campaigns are now the largest of their kind in the world.

Musculoskeletal disorders (MSDs), affecting the body's muscles, joints, tendons, ligaments and nerves, are the biggest cause of absence from work in practically all of the EU Member States.

This campaign will seek to promote an integrated management approach to this problem, emphasising the idea that employers, employees and governments should work together to tackle MSDs.

It will emphasise the concept of 'managing the load': considering not just the load being carried, for example, but all of the strains being put on the body by environmental factors, and the pace at which the task is carried out.

It will also stress the importance of managing the retention, rehabilitation and return to work of those who suffer, or have suffered, from MSDs.

More information on MSDs is available at <https://osha.europa.eu/en/themes/musculoskeletal-disorders>.

This campaign will be organised under the Healthy Workplaces Campaign umbrella and the slogan will be: 'Healthy Workplaces manage musculoskeletal disorders'

Campaign publications are translated into more than 20 languages and include a campaign guide, leaflets, poster and PowerPoint presentations. The main communication, promotion and distribution channel of the campaign is a multilingual website which will also display all publications and other promotion material.

The campaign is open to all organisations and individuals at local, national and European level. However, the campaign material is mainly distributed to intermediaries such as the network of focal points, trade unions and safety representatives, employers' organisations and occupational safety and health professionals and practitioners.

Information on previous Healthy Workplaces Campaigns can be found at <http://osha.europa.eu/en/campaigns>.



Samples and work extracts to be provided

Overall visual concept

The tenderer is requested to provide a document presenting the main features of the campaign branding and to explain the conceptual and creative process for the development of the visual identity. The proposed concept should be applicable to both print, online products, promotional, audio-visual and exhibition materials. The tenderer should indicate the timeline and rounds of proofs estimated for the task.

Poster mock-up

The poster is the centrepiece of the campaign design, containing the key visual, campaign slogan, corporate and campaign logos. Final format will be A2, full colour.

Leaflet mock-up

The leaflet is aimed at intermediaries, briefly summarising the campaign. Final format will be A4, full colour, tri-folded, double-sided.

Animated online banner mock-up

The animated online banner is used in external websites, linking to EU-OSHA's campaign website. The banner should include the campaign slogan and campaign logo. Final format will be 180 x 150 pixel.

Tenderers can check artwork for the previous campaign on MSDs in Annex XI. Tenderers should propose a completely new creative approach not based on the examples.

The tenderer must present an overall budget and a budget breakdown, as well as indicate the number of person-days necessary to develop and implement the project in the financial form (Annex VIII).

Tenderers must provide a written text of maximum 5000 words (and 12 pages approximately), with a clear and detailed description of the planned actions and project management, as well as the relevance and functionality of the proposed approach. Additional material and/or a demonstration can be provided in digital format (online — URL; offline — on a USB stick and readable with the most common computer tools). Clarity and concision will be highly appreciated.

Scenario 2 — Production of a teaser video for the Healthy Workplaces Campaign on MSDs

Tenderers should conceive the storyboard (film outline in pictures) of a video/animation in English of maximum 30 seconds' duration. The storyboard must use a 'story-telling' approach. Its aim is to raise awareness about the campaign and its topics and to attract visitors to the campaign website.

The main message should be "Healthy Workplaces Manage MSDs".

Background

EU-OSHA runs biannual campaigns on safety and health issues. For more information see: <https://osha.europa.eu/en/campaigns>

See also EU-OSHA campaign videos on YouTube <https://www.youtube.com/user/EUOSHA/featured>

Deliverables

The tenderer should prepare a proposal including:



- A concept development;
- A storyboard;

The tenderer must present an overall budget and a budget breakdown, as well as indicate the number of person-days necessary to develop and implement the project in the financial form (Annex VIII).

Tenderers must provide a written text of maximum 5000 words (and 12 pages approximately), with a clear and detailed description of the planned actions and project management, as well as the relevance and functionality of the proposed approach. Additional material and/or a demonstration can be provided in digital format (online — URL; offline — on a USB stick and readable with the most common computer tools). Clarity and concision will be highly appreciated.

4.3 Part C — Financial offer

The financial offer must not exceed the maximum budget indicated in the section 1.4 - Estimated volume.

Tenderers are requested to duly complete and submit the financial form (included in Annex VIII).

The financial offer must be presented in a paper version and in an electronic version (USB memory stick or equivalent).

These proposals are based on the estimated budget and the scenario budgets.

Prices must be quoted in euros as explained in section 3.11 - Price.

4.4 Double envelope system

The documentation will consist of Microsoft Office documents (word and excel for the tender), PDF and JPG (for visual requested in the scenarios) or equivalent and compatible with Microsoft Office, in digital format (USB stick or equivalent) and in printed format.

The tender must be placed inside two sealed envelopes addressed as indicated below.

The **outer envelope** should state the address for submission of the tenders (see below in section 4.5 - **Error! Reference source not found.**). The date of posting should be legible on the outer envelope.

The **inner envelope** should be marked as follows: 'CALL FOR TENDERS — NOT TO BE OPENED BY THE INTERNAL MAIL DEPARTMENT' and should include the following information:

- the **reference number** of the tender - EUOSHA/2017/OP/F/SE/0032;
- the **project title** – Design, layout and production of printed, audio-visual and exhibition materials;
- the **name of the tenderer**;

The inner envelope must also contain three sealed envelopes which are:

- **Envelope A** — Administrative part and supporting documentation for the selection criteria **one original** + an **electronic version** (USB memory or equivalent)
- **Envelope B** — Technical offer: **one original** (on paper, unbound, clearly marked 'Original' and each page to be signed/initialled), **two copies** (on paper, bound and each marked as 'Copy') and an **electronic copy** (USB memory stick or equivalent) as requested in section 4.2 - Part B — technical



- **Envelope C — Financial offer: one original** (in paper, unbound, clearly marked 'Original' and each page to be signed/initialled), **two copies** (on paper, bound and each marked as 'Copy') and **an electronic copy** (USB memory stick or equivalent) as requested in section 4.3 - Part C — Financial.

4.5 Postal address

European Agency for Safety and Health at Work
Calle Santiago de Compostela, 12 (Edificio Miribilla) – 5th Floor
E - 48003 Bilbao - Spain
Email: cft0032@osha.europa.eu

4.6 Date for submission

The tender should be postmarked **no later than** the date indicated in the timetable in section 1.3 -Time schedule for this tender and as stated in the invitation to tender.



5 Evaluation and award of the contract

Tenders will be opened and evaluated by the members of the opening and evaluation committees. These committees must be appointed by EU-OSHA, one of the members being from a different unit than the one responsible for this call for tender. The evaluation committee can be assisted by external experts.

5.1 Opening session

The main aim of the opening session is to check whether the tender received is compliant with the following formal requirements:

1. The tender was submitted not later than the submission deadline.
2. The envelope containing the tender is sealed.

EU-OSHA reserves the right to exclude tenders that fail to comply with any of the above-mentioned requirements.

The opening session will take place on the date indicated in the time schedule in section 1.3 -Time schedule for this tender at the premises of EU-OSHA.

Tenderers wishing to attend the opening session must follow the indications stated in the invitation to tender (section 8).

5.2 Evaluation of the tenders

Tenders will be evaluated in three stages in the following order:

1. The evaluation committee will evaluate the tenders and awards a score for each, according to the best quality/price ratio (sections 5.2.1 - Technical evaluation and 5.2.2 - Financial evaluation).
2. The evaluation committee will assess the eligibility of the best ranked tenders according to the exclusion criteria in section 5.2.3 - Exclusion criteria.
3. The evaluation committee will assess the capacity to perform the contract of the best ranked tenderers in view of the selection criteria in section 5.2.4 - Selection criteria.

The evaluation procedure is confidential. The evaluation committee's deliberations are held in closed session and its decisions are collective.

5.2.1 *Technical evaluation*

The tender will be assessed against the criteria as below:

Project management (PM), quality assurance (QA) and quality of service (QS)

Award criteria for PM, QA and QS	Information to be provided	Points
Quality, relevance of the proposed approach	<ul style="list-style-type: none"> ▪ The tenderer should describe the proposed approach to the contract, including methods to ensure the tenderer is able to respond professionally and in a timely manner to any type of request for services described in this call for tender; 	<p style="text-align: center;">150</p> <p style="text-align: center;">(min. 50%)</p>



	<ul style="list-style-type: none"> ▪ The approach must be relevant and stringent, especially regarding the planning of the work; ▪ The tenderer must explain how the methodology will guarantee a consistently high level of service and maximum efficiency in terms of costs, speed and quality of services described in the tender specifications 	
Quality of the team organisation and stability of service	<ul style="list-style-type: none"> ▪ The tenderer will demonstrate how to guarantee sufficient and qualified resources for the continuity/stability of the service; ▪ The tenderer should demonstrate ability to carry out different projects of tasks simultaneously; It must also be explained how the tenderer will track/monitor the schedule set for the project teams, avoid work overload and comply with deadlines specified 	100 (min. 50%)
Quality control of work performed	<ul style="list-style-type: none"> ▪ The tenderer should describe the systems they will set up to report about project progress, number of working days used and financial overview; ▪ The tenderer should demonstrate how they will ensure to control the quality of every deliverable before it is sent to EU-OSHA 	100 (min. 50%)
Continuous improvement plan	<ul style="list-style-type: none"> ▪ The tenderer should demonstrate, through examples or lessons learned, how the accomplishment of project goals will be ensured and how improvement plans will be implemented; ▪ The tenderer should identify the major challenges or obstacles that may occur during implementation and propose solutions 	50 (min. 50%)
Total points PM/QA/QS		400
<i>Minimum points required</i>		<i>240</i>

Scenarios

▪ Scenario 1: Visual identity of EU-OSHA campaign on MSDs

Award criteria for scenario 1	Points
Overall approach, understanding of EU-OSHA's needs in terms of overall fit into the corporate image and suitability for target audiences	100
Creativity, originality and appeal of the visual concept and mock-ups	200
Compliance with EU-OSHA's corporate design manual	50
Turnaround time	50
Total points Scenario 1	400
<i>Minimum points required (50%)</i>	<i>200</i>



▪ **Scenario 2 — Production of a teaser video for a EU-OSHA campaign on MSDs**

Award criteria for scenario 2	Points
Overall approach, understanding of EU-OSHA's needs in terms of overall fit into the corporate image and suitability for target audiences	50
Creativity, originality and appeal of the visual concept and the storyboard	120
Compliance with EU-OSHA's corporate design manual	20
Turnaround time	10
Total points Scenario 2	200
<i>Minimum points required (50%)</i>	<i>100</i>

The technical score will be calculated adding the number of points obtained for project management, quality assurance and quality of service and the number of points obtained for the scenarios:

$$\text{Total technical score} = \text{Total points PM/QA/QS} + \text{scenario 1} + \text{scenario 2}$$

5.2.2 Financial evaluation

In order to evaluate the bids, EU-OSHA will use **reference prices** based on the prices submitted by the tenderers and the method presented in Annex VIII.

Only these reference prices will be taken into account when awarding the contract.

The cheapest tender will receive the higher score (1000). The other tenders will receive a score as follows:

$$\text{Financial score} = 1000 \times \text{cheapest price} / \text{price of the tender}$$

5.2.3 Exclusion criteria

EU-OSHA shall accept a signed Declaration of honour as satisfactory evidence that the tenderer is not in one of the situations described in the declaration (Annex II).

The **awarded tenderer shall furnish**, within a time-limit specified by the awarding authority and prior to the signature of the contract, **the additional documentation that is described in the declaration** (Annex II).

5.2.4 Selection criteria

The tenderer must submit evidence of capacity to perform the contract.

Administrative capacity

Any tenderer has to prove that they are authorised to perform the contract under national law, as evidenced by power of attorney and by inclusion in a trade or professional register, or a sworn declaration or certificate, membership of a specific organisation, express authorisation, or entry in the VAT register. (see Annexes III, IV and V).



The evaluation committee will examine the tenders to ensure that the information requested in the selection criteria has been provided and that the tenderer fulfils all these criteria. Tenderers which fail to include some of the information requested may be rejected outright.

Economic and financial capacity

Proof of economic and financial capacity must be furnished by:

- a statement of overall turnover and turnover of minimum 250,000 euros **concerning the provision of tasks and services described** for the last 3 financial years (a statement concerning other types of services **will not be taken** into consideration);
- balance sheets for, at most, the last 3 years for which accounts have been closed;
- a declaration of a financial entity where the tenderer has its account certifying the absence of payments problems or debts with the bank or third parties.

Technical and professional capacity

The purpose of this section is to detail the minimum requirements that the tenderer must fulfil in order to be considered in the process.

The tenderer must demonstrate the ability to meet the following requirements:

- a) Appropriate organisational and staffing structure for the services required by EU-OSHA
- b) A minimum of three years' experience of projects similar to the services described acquired in the period 2012–2016, for clients in the public and private sector at national/international level.
- c) Competent staff to carry out the services. The account manager and the main team members responsible for carrying out the project must have the appropriate professional experience in the services required under these tender specifications and an excellent level of working English.
- d) Appropriate facilities, technical equipment and material to carry out the services required under this call for tender especially taking into account the multilingualism dimension.

The following documents and information must be presented as evidence of compliance with the technical and professional requirements:

For a)

- A concise company profile (maximum 1500 words), describing the tenderer's main current activities and demonstrating the ability to provide services similar to those communicated.
- A description of the firm's organisational structure, including a statement of the average annual manpower and the number of managerial staff in the last three years. The tenderer must provide a description of the organisation and the hierarchy levels, as well as completing the following table with the appropriate categories (please note that it is provided as an example and it has to be adapted to tenderer's need).

	Year-1	Year -2	Year -3
Directors	15	12	10
Project Managers	30	24	20
Graphic designer (senior)



Graphic designer (junior)
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For b)

- A list of the **principal services, similar to those described in this call for tender**, that have been provided over the last three years, including the amount, the period, when possible the name of clients, and the sector (public or private).
- A description and evidence of at least three and a maximum of five contracts or projects performed in the past three years, similar in scope, size and nature to those described in this call for tender. In order to prove this capacity, tenderers are requested to complete a project/activity reference form (PARF) for each contract or project, indicating the precise type of work carried out, the date, the approximate value of the contract and the customer. The PARFs must demonstrate the tenderer's ability to deliver the services that form part of this call for tender.
- At least one of the PARFs must relate to a project with a value of 40,000 € minimum.

For c)

- Tenderers should supply the CVs of the account manager and the main team members who will be responsible for carrying out the project (**maximum two pages per team member**), reflecting their capacity to meet the requirements stated in this call for tender. The CVs of only the staff members assigned to the tasks, as described below, will be taken into consideration in the evaluation of the tender.
- The CVs will be assessed in terms of technical expertise in managing similar projects.
- Tenderers are requested to use the European template, which can be downloaded at <http://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>
- The CVs must show evidence of language skills (min. B2 or equivalent in English)
- The tenderer must provide at least the following profiles of expertise:

Profile	Minimum of required years
Project Manager	3
Graphic Designer Senior	3
Graphic Designer Junior	3

Documents to provide in the case of tender presented by a consortium:

- Consortium form (Annex VI) must be completed

In addition, each member of the consortium must provide evidence for:

- Exclusion criteria and administrative data (Annexes II, III and V)
- Economic capacity (statement of overall turnover and turnover for the last three years).
- Technical and professional capacity (concise company profile, list of main contracts).



The evidence provided by each member of the consortium will be checked to ensure that the consortium **as a whole** fulfils the criteria.

Documents to provide in the case of tender with subcontracting

The tenderer must clearly indicate which parts of the work will be subcontracted, and give the identity of all subcontractors undertaking more than 25 % of the work by value (see Annex VII). In addition, each subcontractor must present proof of exclusion criteria, economic, technical and professional capacity by providing:

- Exclusion criteria and administrative data (Annexes II, III and V).
- Economic capacity (statement of overall turnover and turnover **of the volume of subcontracted tasks** for the last three years).
- **Concise company profile**, including a short description of the subcontractor's economic activity demonstrating the ability to provide services that will be subcontracted to the company (maximum of 1500 words), including its activity with regards to the scope of this call for tender.
- **A maximum of two contracts/projects** performed in the last five years, similar in scope and nature to those that will be subcontracted. In order to prove this capacity, subcontractors are requested to complete one project/activity reference forms (PARFs); PARFs should indicate the precise type of work carried out, the date, the human and financial resources used, the value of the contract and the client (public or private).
- **Detailed CV(s)** of the subcontractors' staff related to the subcontracted tasks (for details on how to submit a CV, refer to 'CV specifications' above in section c)).

As the technical and professional capacity of tenderers will be assessed on the basis of the documents requested above, tenderers should note that any total or partial omission of information for which one or more providers involved in the tender are responsible may lead EU-OSHA to exclude the tenderer from the rest of this procedure.

5.2.5 Award

Based on the most economically advantageous tender and according to the best price – quality ratio method, the contract will be awarded to the tenderer with the highest final score, which will be calculated as follows:

$$\text{Final score} = (0,6 \times \text{technical score}) + (0,4 \times \text{financial score})$$



Annexes

Annex I	Checklist
Annex II	Declaration of honour
Annex III	Legal entity form
Annex IV	Financial identification form
Annex V	Administrative form
Annex VI	Consortium form
Annex VII	Subcontracting form
Annex VIII	Financial form
Annex IX	PARF - Project/Activity Reference Form
Annex X	EU-OSHA corporate design manual
Annex XI	Artwork MSDs Campaign
Annex XII	EU-OSHA logo
Annex XIII	EU-OSHA HW logo
Annex XIV	EU-logo
Annex XV	Declaration of confidentiality