EUROPEAN MEDICINES AGENCY
SCIENCE MEDICINES HEALTH

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# Technical specifications for open invitation to tender

No. EMA 2012-37-ED: Online strategy and interface design

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# Technical specifications for open invitation to tender

# No. EMA 2012-37-ED: Online strategy and interface design

## 1. Title of the invitation to tender

This document contains the Technical Specifications for the Open Invitation to Tender no. EMA 2012-37-ED for Online strategy and interface design support to the European Medicines Agency.

The contract notice for this open tender has been published in the Official Journal of the European Union on 7th of June 2013 in OJS 109.

Glossary

| Term | Description |
|---|---|
| EMA | European Medicines Agency ('the Agency') |
| CFT | Call for tender. In this document, used interchangeably with the term ITT |
| Charges | The amount payable covering all the services provided, exclusive of VAT |
| Service Provider | A tenderer to which a framework contract has been awarded. |
| Effort | The amount of work required to complete a task. |
| Evaluation Committee | A committee made up of staff from the European Medicines Agency ("the Agency") which is tasked with evaluating the tender responses. |
| ITT | Invitation to tender. Although, in this document, the term ITT can used interchangeably with the term CFT, the term ITT is preferred. |
| PPC | Pay per click |
| SEM | Search Engine Marketing |
| SEA | Search Engine Advertising |
| SEO | Search Engine Optimisation |
| Tenderer | An economic operator or group of economic operators which is submitting a response to this ITT. |
| WCMS | Web Content Management System |

## 2. Objectives and context of the invitation to tender

Of the EU27 population approximately 325 million people use the internet at least once a week. The European Parliament and Council have given the Agency a clear role in the protection of public health through the provision of online information on medicines and the Agency wishes to develop its existing online platforms over the coming years to successfully meet this responsibility. As the number one access-point by EMA stakeholders to Agency information and data, this is a critical area of work for the Agency.

The Agency's online constituency is very broad including patients and consumers, healthcare professionals, pharmaceutical industry, EMA staff, the media, national competent authorities in the Member States and Brussels-based authorities. The Agency needs to ensure it is able to provide online services and information for these groups in a downloadable and consumable format. It also needs to take advantage of developments in social media and other online technologies to ensure that the Agency reaches its stakeholders in the most efficient way possible. By making its online platforms user-friendly, the Agency also hopes to reduce the number of enquiries by telephone and email which it currently receives.

As a consequence of the changing online environment, the Agency adopted during 2012 an online roadmap 2012-2017. The goal of the roadmap is to reduce the current number of Agency-hosted websites (18+) used by our various stakeholder groups to a smaller number of websites. Each website will be aimed at distinct primary audiences and will offer information and services tailored to these audiences.

In order to ensure that the user interface matches the content and task requirements of its online stakeholder groups the Agency wishes to work with a digital communications company who can provide a range of usability and design services over the next four years.

Social media use and Search Engine Marketing (SEM) including SEO and SEA are also areas which the Agency requires advisory support in order to achieve a higher ranking in search results.

The supplier would also be expected to support the design of user interfaces for transactional systems managed by the Agency.

**About the Agency**

The European Medicines Agency ("the Agency") is a decentralised body of the European Union based in Canary Wharf in the Docklands area of London (E14). Its main responsibility is the protection and promotion of public and animal health, through the evaluation and supervision of medicines for human and veterinary use.

The Agency was established in 1995 and operates under Council Regulation No 726/2004 to provide a system for the authorisation of medicinal products. The Agency is an Agency of the European Union and has its own legal personality. The Agency's budget is subject to checks and audits by the Court of Auditors.

The Agency is responsible for the scientific evaluation of applications for European marketing authorisation for medicinal products (centralised procedure). Under the centralised procedure, companies submit a single marketing authorisation application to the Agency. Once granted by the European Commission, a centralised marketing authorisation is valid in all European Union and EEA-EFTA states. The safety of medicines is monitored constantly by the Agency through a pharmacovigilance network.

The Agency also gives scientific advice and protocol assistance to companies for the development of new medicinal products. It published guidelines on quality, safety and efficacy testing requirements. A dedicated office provides special assistance to small and medium-sized enterprises (SMEs). Seven scientific committees, composed of members of all EU and EEA-EFTA states, some including patients' and doctors' representatives, conduct the main scientific work of the Agency.

# 3. Subject of the tender

The Agency intends to sign multiple, cascading framework contracts in order of priority.

The successful service provider will work closely with the Agency's Communications sector which is responsible for implementing the Agency's online information programme and ensuring that its online relationships with stakeholders are user-focused and efficient.

It is important that the service provider:

- has an established professional track record as a digital communications company and has experience of interface design development for large websites (5 000 pages plus) as well as major system/application interfaces used by 100+ users;
- has a deep understanding of the importance of user-centred design and the techniques and processes for effective user research and user testing with key stakeholder groups;
- has a deep knowledge of current and future trends in online;
- understands the character and context of large, multilateral, public, not-for-profit organisations;
- has an established professional track record of translating an organisation's business and communications strategies and objectives into a successful online presence;
- has a strong understanding of best practice in content management and the principles and advantages of Content Management Systems (CMS);
- can demonstrate evidence of long-term relationships with clients over several years that shows continuity and understanding of business needs and changing requirements;
- has an established professional track record in advisory services around the development and implementation of social media strategies and experience in online communities, user-generated content and interactivity;
- has an established professional track record in advisory services around successful search and the principles of search technologies in addition to an established track record in Search Engine Marketing (SEM) solutions including SEO and PPC;
- has an established and transparent project management approach which is deliverables-driven.

**IMPORTANT**: Please note **this is not** an IT-focused service. The service provider will not be asked to customise or build a CMS or other web publishing/information management systems, develop software or provide advice on the Agency's ICT technical architecture.

EMA considers that it may require the following services during the proposed four-year period of this contract:

## *3.1. Website strategy and design services for development of a European medicines web portal*

The Agency is looking for a service provider to provide user research and design services for the launch of a new European Medicines web portal. With the coming into effect in 2012 of the pharmacovigilance legislation (Regulation (EU) No 1235/2010), the Agency is required to launch a European medicines web portal. As such the European Parliament and Council have given the Agency a clearer role in the protection of public health through the provision of online information to the European public. This project aims to improve access to information on medicines authorised in the EU through a multilingual portal for use by the EU citizen, the healthcare professional and those looking for data on medicines such as academic researchers. The Agency aims to integrate content from existing online websites into

the portal including the EudraPharm website and the European database of suspected adverse drug reaction reports.

Activities would include:

**Research**

- review/audit of the Agency's current offering of medicine information online including website reviews and other qualitative and quantitative desk research
- bench-marking exercise of government-managed websites offering information on medicines and structured data of medicines to the public of the EU27 to understand best practice;
- interviews in English with EMA staff at EMA headquarters and national competent authority staff in Member states by telephone (in English) to understand business priorities and the strategic goals of the portal;
- qualitative and quantitative research activities with end-users of the portal including patients, healthcare professionals and academia in the member states: interviewees should be sampled from the EU27 specifically from geographic zones: northern, southern and eastern Europe, interviews should be conducted in the relevant language or will not have English as their first language, EMA will source candidates for interview – maximum of 45 interviews;
- development of three separate surveys for three separate stakeholder groups (in English): patients, healthcare professionals and academic researchers (these will be distributed as appropriate by the Agency through its stakeholder networks. A report analyzing the results of the survey will be delivered by the supplier;
- review of how structured and unstructured data can be downloaded by end-users from the portal so that they can repurpose and re-use according to their needs;

**Strategy**

- development of up to twelve user personae representing the main end-users groups (a patient, a researcher looking for data, a healthcare professional, etc.);
- development of a strategy and recommendations report outlining main strategic principles, objectives and functionalities of the portal;
- development of an SEM strategy to ensure increased search engine visibility to increase visits to the website and improved brand recognition across the EU member states.

**Design, testing and delivery**

- development of an information architecture, detailed wireframes describing functionality, graphic design and HTML templates in the form of a clickable prototype in the English language for main content pages: maximum 35 templates;
- user testing of a clickable prototype by end-users. End-user testing will need to take part in the offices of the supplier or online using the appropriate technology or can be done over Skype or using a similar technology. 30 participants will be expected to user test the website. These will be sourced by EMA. This will be done in English, but at least 80% of participants will not have English as their mother tongue although the testing exercises will be carried out in English;
- delivery of final HTML prototype coded according to Agency technical standards functional specification document and related files to enable easy transition to the development team.

The prototype must demonstrate appropriate accessibility standards as described by the Agency when the project commences.

- Delivery of a mobile version of the prototype built according to the technical standards as described by the Agency when the project commences.

**The service provider is not required to build the design on a WCMS or develop a WCMS.**

The process would be iterative with the service provider reporting regularly to the project management team at the Agency. The service provider is not expected to implement the new design on the Agency's WCMS, but is required to provide all materials specifically the HTML prototype for the Agency to support efficient implementation by the Agency's ICT team. The service provider will be required to take the technical platform (Documentum ) into account when developing the strategy and designs.

It is anticipated that this project would start immediately following the framework contract award and signature.

| | |
|---|---|
| Place of execution of services | London |
| Timeline and duration of service | 7 months |
| Frequency | Once in four years |
| Final deliverable | Delivery of final clickable HTML prototype in English only with design updates following user testing, functional specification document and related files to enable easy transition to the development team. Delivery of an SEM strategy. |
| Anticipated resources required (non-exhaustive but minimum members to be part of project team) | Project manager, information architect, graphic designer, Interface developer (e.g. HTML and CSS), mobile compatibility developer, usability specialist, SEM specialist, Social media specialist |
| Purpose of the assignment | To provide the design and functionality for the new European medicines web portal |

## *3.2. Ad-hoc website / transactional interface design services*

The usability of the Agency's websites and transactional interfaces is critical to ensuring good customer satisfaction and efficiency among users and to avoid reputational damage through poor user experience.

As a result the Agency wants to develop online interfaces which are intuitive and easy to use. The supplier will be expected to provide user interface design services to improve the usability of the Agency's websites and application interfaces over the period of the contract. The process of user research, design, testing and delivery would be similar to that described in 3.1. The type of work could include the design of a new intranet/extranet for the Agency to the development of an interface for an online fee-paying service for the pharmaceutical industry.

| | |
|---|---|
| Place of execution of services | London |

| | |
|---|---|
| Frequency | 5 designs per year |
| Final deliverable | For each design: Delivery of final prototype in English only coded for PC, mobile and tablet. Functional specification document, design guidelines and related files to enable easy transition to the development team. |
| Anticipated resources required (non-exhaustive) | Project manager, information architect, graphic designer, Interface developer (e.g. HTML and CSS), mobile compatibility developer, usability specialist, SEM specialist, Social media specialist |
| Purpose of the assignment | To deliver EMA-branded websites and interfaces that meet user needs. |

## *3.3. User research services*

The need for regular end-user research is a key requirement for EMA. Activities to be carried out are detailed here below:

1. Online survey development with maximum 30 questions, hosting of survey and results analysis report delivered to EMA.
2. End-user research conducted with 10 participants (sourced by the EMA), in the format of one-on-one interviews or a single workshop with an outcome report delivered to EMA. Activities could include card-sorting, personae development etc.
3. User-testing sessions with ten participants (sourced by the EMA) with an outcome report delivered to EMA.

| | |
|---|---|
| Place of execution of services | London |
| Frequency | 4-5 per year of each service (1-3) |
| Final deliverable | Outcome reports |
| Anticipated resources required (non-exhaustive) | Project manager, information architect, usability specialist |
| Purpose of the assignment | To understand end-user needs. |

## *3.4. Online marketing services*

The Agency needs to ensure that its online content is findable by its target audiences. Each Agency-maintained website needs to be accompanied by digital marketing strategies to ensure that the Agency can achieve its online objectives. This work will require the following expertise.

**Advice on social media, blogs, online communities, user-generated content and interactivity/collaborative functionality**

In addition to communicating through its websites, the European Medicines Agency has a clear opportunity to reach out and engage more proactively with those interested in its work through social media channels, and thereby increase findability and visibility of its content and brand online. The Agency would like the service provider to provide advice on how the Agency could best use social media over the period of the contract. This would include advice on new developments and trends, new technologies and how the Agency could use these tools to support its communications strategy and strategic business goals.

| | |
|---|---|
| Place of execution of services | London |
| Frequency | 30 days per year |
| Final deliverable | Strategies, reports and presentations |
| Anticipated resources required (non-exhaustive) | Social media specialist |
| Purpose of the assignment | To provide advice on best use of the social media by the Agency. |

**Search Engine Marketing (SEM) services**

To ensure the findability and visibility of its content and brand online, the Agency wants to develop effective Search Engine Marketing (SEM) strategies. The Agency would like the service provider to develop an SEM strategy for the Agency to include advice on SEO and PPC and provide ad-hoc advice to Agency as new development and trends emerge over the period of the contract. The service provider would also be expected to work with the ICT Unit at the Agency on the technical implementation aspects of any SEM strategy proposed.

| | |
|---|---|
| Place of execution of services | London |
| Frequency | 30 days per year |
| Final deliverable | Written reports and presentations |
| Anticipated resources required (non-exhaustive) | SEM specialist |
| Purpose of the assignment | To ensure that the Agency's websites are search-engine optimised. |

**Ad-hoc rich media services**

The service provider would be expected to execute on an ad hoc basis following a briefing from the Agency, a range of rich media artifacts to support the understandability and visibility of Agency campaigns and initiatives including:

- Banners and buttons
- Animated video

- Infographics: animated/interactive maps, charts and tables

The service provider would be expected to source imagery from appropriate image libraries. This tenderer would cover this cost. The Agency cannot be billed separately for this cost.

| | |
|---|---|
| Place of execution of services | London |
| Frequency | 100 days per year |
| Final deliverable | • Banners and buttons<br>• Animated video<br>• Info-graphics: animated/interactive maps, charts and tables |
| Anticipated resources required (non-exhaustive) | Graphic designer<br>Interface developer (e.g. HTML and CSS)<br>Usability specialist |
| Purpose of the assignment | To provide graphics for the Agency's websites. |

# 4. Participation in the tender

## *4.1. Agreements on public procurement*

Participation in the Agency's tendering procedures is open on equal terms to all natural and legal persons coming within the scope of the Treaties and to all natural and legal persons in a third country which has a special agreement with Union in the field of public procurement under the conditions laid down in that agreement.

The Agency can therefore accept offers from and sign contracts with tenderers from the EU Member States, EEA countries and any other country which has an international agreement with the Union in the field of public procurement. The tender procedures of the Agency are not however open to tenderers from countries which have ratified the Multilateral Agreement on Government Procurement ("GPA").

## *4.2. Subcontracting*

If the tender envisages subcontracting any part of this contract, the following documents must be provided with the tender submission:

(i) A document signed by the tenderer stating clearly the identity, roles, activities and responsibilities of subcontractor(s) and specifying the volume/proportion for each subcontractor.

(ii) A letter of intent by each subcontractor stating its unambiguous undertaking to collaborate with the tenderer if it wins the contract and the extent of the resources that it will put at the tenderer's disposal for the performance of the contract.

(iii) If requested under points 12, 13 and 14 any documents regarding the exclusion and/or selection criteria for any subcontractors.

If such documents are not provided, the Agency shall assume that the tenderer does not intend subcontracting.

## 5. Additional documentation available to tenderers

Further information about the work of the Agency can be obtained on its website: http://www.ema.europa.eu.

## 6. Information visit – not applicable

## 7. Variants – not applicable

## 8. Estimated contract volume

The Agency estimates, without this being binding, that the volume of services required under the contract over a four year period is as shown below:

| Type of service | Total Qty |
|---|---|
| Project cost for the seven-month European medicines web portal design project | 1 |
| Online survey development with maximum 30 questions, hosting of survey and results analysis report delivered to EMA. | 20 |
| End-user research conducted with 10 participants (sourced by the EMA), in the format of one-on-one interviews or a single workshop with an outcome report delivered to EMA. Activities could include card-sorting, personae development etc. | 40 |
| User-testing sessions with ten participants (sourced by the EMA) with an outcome report delivered to EMA. | 40 |

| Consultancy | Total Days |
|---|---|
| Interface developer (HTML and CSS) | 400 |
| Mobile compatibility developer | 400 |
| Usability specialist | 80 |
| Graphic designer | 180 |
| Information architect | 252 |
| Project manager | 400 |
| SEM specialist | 200 |
| Social media specialist | 80 |

# 9. Price

## *9.1. Currency of tender*

Prices should be submitted in Euros. The costing sheet attached to these specifications must be used to submit a tender. Please note that any financial costing sheet must be submitted in separate binders or folders, which must be clearly labelled.

## *9.2. All-inclusive prices*

Prices submitted in response to this tender must be inclusive of all costs involved in the performance of the contract (e.g. to include travel, subsistence and etc). No expenses incurred in the performance of the services will be reimbursed separately by the Agency.

## *9.3. Price revision*

Prices submitted in response to this tender shall be fixed and not subject to revision for Specific Contracts concluded during the first year of performance of the contract.

From the beginning of the second year of performance of the contract, prices may be revised upwards or downwards each year, where such revision is requested by one of the contracting parties by notice served no later than three months before the anniversary of the date on which the contract became effective. Specific Contracts shall be concluded on the basis of the prices in force on the date on which they are signed. Such prices shall not be subject to revision.

This revision shall be determined by the trend in the European Index of Consumer Prices (EICP) published by the Statistical Office of the European Union in its monthly bulletin under the theme of Economy and Finance: Harmonized Indices of Consumer Prices

(European Union index) (http://epp.eurostat.ec.europa.eu)Revision shall be calculated in accordance with the following formula:

$$Ar = Ao * \frac{Ir}{Io}$$

Where

Ar = revised total amount

Ao = total amount in the original tender

Io = index for the month in which the validity of the tender expires

Ir = index for the month corresponding to the date of receipt of the letter requesting revision of prices

## *9.4. Costs involved in preparing and submitting a tender*

The Agency will not reimburse any costs incurred in the preparation and submission of a tender. Any such costs must be paid by the tenderer.

### *9.5. Period of validity of the tender*

Tenderers must enclose a confirmation that the prices given are valid for 9 months from the final date of submission of the tender.

### *9.6. Protocol on the Privileges and Immunities of the European Union*

The Agency is, as a rule, exempt from all taxes and duties, and in certain circumstances is entitled to a refund for indirect tax incurred such as value added tax (VAT), pursuant to the provisions of Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Union. Tenderers must therefore give prices which are exclusive of any taxes and duties and must indicate the amount of VAT separately.

## 10. Payment arrangements

Payment shall always be made in arrears by the Agency according to milestones and deliverables established in each specific contract, by bank transfer to the Service provider's bank account.

Payments shall be made within 30 days of receipt of the request for payment and shall be deemed to have been made on the date on which they are debited to the Agency's account. The Agency may, however, after giving notice to the Service Provider, defer payment if the services covered by the request for payment are contested by the Agency or if the documents in support of the request are incomplete. Where payment is so deferred, the Agency shall not be liable to pay interest or indemnities of any kind. All requests for payment and any complaints shall be sent to the following address:

European Medicines Agency

7 Westferry Circus

Canary Wharf

London

E14 4HB

United Kingdom

The Agency shall be bound to comply with payment periods only if requests for payment are properly presented at the above address. The Service provider is required to give the following information on all invoices:

- The breakdown of fees, the invoice price and the amount of VAT applied, if any, or, whenever appropriate, a note that the services rendered under the contract are exempted from VAT in accordance with the national tax law by which the Service provider is governed.
- A reference to the framework contract number and specific contract number.
- A reference to the Agency's purchase order number.

## 11. Contractual details

A draft contract is attached to these Technical Specifications as Annex V. Tenderers must confirm acceptance of the draft contract and terms and conditions of the tender as part of their tender response.

The Agency wishes to conclude a maximum of three framework contracts in cascade, to provide services, as and when required, for an initial period of two years, with the possibility of two renewals each of one year. A request for services is sent to the primary contractor in the first instance. If that contractor is unable or unwilling to provide the services, EMA would then send the request to the secondary contractor and so on down the cascade. If none of the contractors in the cascade can fulfil the requirement, EMA reserves the right to look for alternative suppliers.

A framework contract will establish the terms governing specific contracts to be awarded during a given period, in particular with regard to price.

Signature of the framework contract imposes no obligation on the Agency to order services. Only the implementation of the framework contract through specific contracts is binding for the Agency.

Each specific contract will contain details of deliverables and timelines for particular services to be provided.

# 12. Exclusion criteria

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

The successful tenderer shall provide the documents mentioned as supporting evidence in Annex II before signature of the contract and within a deadline given by the contracting authority. This requirement applies to all members of the consortium in case of joint tender and to subcontractors.

The Agency may waive the obligation of a tenderer to submit the documentary evidence referred to above if such evidence has already been submitted to it for the purposes of another procurement procedure and provided that the issuing date of the documents does not exceed one year and that they are still valid. In such a case the tenderer shall declare on its honour that the documentary evidence has already been provided in a previous procurement procedure and confirm that no changes in its situation have occurred.

# 13. Selection criteria

## *13.1. Selection criteria: Financial and economic capacity*

**Tenderers should provide the information requested in this section by using the questionnaire provided in Annex III: Response Questionnaire.**

Requirements:

Tenderers must be in a stable financial position and have the economic and financial capacity to perform the contract. The annual turnover of the tenderer must be of a minimum value of one 2.5M Euro for each of the last three financial years.

The documentation supplied in response to this section will be reviewed to assess the general financial health of the tenderer (or all tenderers in the case of joint tenders whereby a consolidated assessment shall be made) and parent companies where the parent company is providing a guarantee. In addition to verifying that the financial turnover meets the required minimum amounts, as listed above and in the Official Journal notice, the on-going economic capacity will be assessed including financial independence and liquidity.

Evidence required:

The documents or information listed below must be presented as evidence of compliance with the economic and financial capacity. If subcontracting is envisaged, documentation must be provided in relation to any subcontractors.

If the tenderer is a company and is otherwise required under the law of the State in which it is established to publish its accounts, the following information is requested:

1. appropriate statements from banks or, where appropriate, evidence of relevant professional risk indemnity insurance;

2. financial statement for the last three years for which accounts have been closed;

3. a statement of overall turnover and turnover concerning the services covered by the contract for the last three financial years;

4. if the tenderer relies on the capacities of other entities (e.g. a parent company), a written undertaking on the part of those entities confirming that they will place the resources necessary for performance of the contract at the disposal of the tenderer for the period of the contract. In such case the Agency may require that the successful tenderer(s) and such entities are jointly liable for the execution of the contract.

5. if the organisation is a member of a group of companies, documents under points 1, 2 and 3 are required for both the tenderer and its ultimate holding company. Where a consortium or association is proposed, the information is requested for each member company.

The Agency may waive the obligation of a tenderer to submit the documentary evidence referred to above in points 1, 2 and 3 if such evidence has been submitted to it for the purposes of another procurement procedure and if it still complies with the requirements of the Agency. If, for some exceptional reason which the contracting authority considers justified, the tenderer is unable to provide the documentation mentioned in points 1, 2 and 3, it may prove its economic and financial capacity by any other means which the contracting authority considers appropriate.

## *13.2. Selection criteria: professional and technical capacity*

**Tenderers should provide the information requested in this section by using the questionnaire provided in Annex III: Response Questionnaire.**

Requirements:

The criteria for this contract are:

- Authorisation of the tenderer to perform the contract under national law (Evidence Required 1 “ER 1”)
- Suitably qualified and experienced staff proposed for the Agency. Tenderers must demonstrate that they have at least (ER2):
    - one account manager with a minimum of five years’ full time experience managing accounts;
    - Two Interface developers (HTML and CSS) with a least five years’ full-time experience in developing HTML and CSS

- Two mobile compatibility developers with a least three years' experience in developing mobile applications
- Two usability specialists with at least five years' experience in online user research
- Two graphic designers with at least five years' experience in website interface design work, creating banners and buttons for online, animated video and infographics for online (animated/interactive maps, charts and tables)
- Two information architects with at least five years' experience in organising information on websites and creating navigation and functional specifications
- Two project managers with at least five years' experience in managing projects of the type described in this tender
- One search Engine Marketing (SEM) specialist with at least five years' experience in Search Engine Optimisation (SEO) and Pay per Click
- One social media specialist with at least five years' experience in developing social media strategies for organisations.

- The tenderer must have relevant experience in (ER3):
  a. Website strategy and design
     i. at least 3 website redesign projects including an intranet/extranet redesign carried out in the last 2 years for a client;
  b. User research services
     i. At least 1 end-user research project carried out in the last two years for a client;
  c. Online marketing services
     i. Social media strategy development: social networks, online communities, user-generated content and interactivity services (at least one social media strategy developed for a client);
     ii. Search Engine Marketing (SEM) services (at least one search engine marketing strategy for a client);
     iii. Rich-media services (banners and buttons, animated video, info-graphics: animated/interactive maps, charts and tables);
- Quality assurance accreditation (ER4)

Tenderers must meet <u>all</u> of the above requirements.

<u>Evidence required:</u>

The documents or information listed below must be presented as evidence of compliance with these selection criteria. For joint tenders the Evaluation Committee will assess the combined capacities of all members, including sub-contractors.

1. Authorisation to perform the contract under national law, as evidenced by inclusion in a trade or professional register, or a sworn declaration or certificate, membership of a specific organisation, express authorisation of entry in the VAT register ("ER1").
2. Proof of professional qualifications and experience of the profiles indicated in the requirements. If Curricula Vitae are submitted they must bear no indication of name or date of birth, only a

number. A separate list should be included showing the association between these numbers and actual names (“ER2”).

3. A list of the principal services provided in the last three years, where similar expertise to that required by EMA has been provided, including the sums, dates and recipients, public or private; relating to a, b, c and their respective sub-items in the requirements (“ER3”).

4. Details of any quality assurance accreditation that the tenderer holds. If no accreditation held, please provide an outline of any quality assurance policy. Please also provide details of any quality assurance accreditations for which you have applied (“ER4”).

# 14. Award criteria

The award criteria which will apply to this tender is as follows. Once the tenderer has demonstrated the appropriate capacity to perform the contract on the grounds of the selection criteria, the offer will be assessed on the basis of the award criteria. The award criteria serves to identify the most technically and economically advantageous tender. The quality of each offer will be evaluated in accordance with the award criteria and the associated weighting. No award criteria and subcriteria other than those detailed below will be used to evaluate the offer. For joint tenders the award criteria shall be evaluated in relation to the tender as a whole.

The award criteria for this tender shall be evaluated as follows:

1. Quality of the services to be provided: 60 points

| | |
|---|---|
| Project plan for the development of the European medicines web portal | 15 |
| Quality of design skills | 5 |
| Digital marketing strategy | 15 |
| User research and testing | 15 |
| Infographics | 10 |

2. Presentation: 10 points

3. Price: 30 points

TOTAL: 100 points

## *14.1. Quality of the services to be provided*

The above points will be awarded following an initial evaluation of the tenders.

A minimum of 40 of the overall 60 points for quality must be achieved. Any tenderer not reaching this amount of 40 points will be eliminated from the procedure. The remaining tenderers will be invited to give a presentation to the evaluation committee as set out in section 14.2. Such presentation is mandatory and any tenderer declining to give a presentation will be eliminated from the procedure. It is expected that tenderers will be informed by the end of August if they will be required to give a presentation. Presentations will be in English and are expected to take place in September 2013.

### 14.1.1. Clarification regarding the Quality award criteria:

In order to allow the assessment of the award criteria (quality of the services to be provided =60 points), the following documents must be provided by the tenderer as part of its submission. These documents have to be provided on CD/DVD and paper format.

1. **Project plan for the development of the European medicines web portal:** a detailed description of how the redesign project described in section 3.1 will run.
2. **Quality of design skills:** the tenderer is required to provide a redesigned homepage for the European Clinical Trials website: https://www.clinicaltrialsregister.eu/ and a redesigned results page: https://www.clinicaltrialsregister.eu/ctr-search/search?query=cancer. The primary audience for the webpages would be a patient or carer who is interested in finding out about clinical trials for their condition.
3. **Digital marketing strategy:** A short strategy report on how the Agency could consider SEM and social media techniques and tools to increase findability and visibility of its websites on the internet.
4. **User research and testing:** A three-page explanation of how the tenderer would carry out user research and user testing of a proposed website interface with healthcare professionals who are in different locations across the European Union. What would be the proposed methodologies and technologies used to carry out both user research and testing?;
5. **Infographics:** An infographic of page 9 of the report on '*Clinical trials submitted in marketing-authorisation applications to the European Medicines Agency*' located on the Agency's website at http://www.ema.europa.eu/docs/en_GB/document_library/Other/2009/12/WC500016819.pdf must be delivered on CD-ROM or similar. The target for the infographic is the media who need to have a quick, easy-to-understand view of the statistics.

The following elements will be also taken into account when evaluating the quality of the services to be provided:

A. *Project plan*: evidence that the tenderer has taken into consideration all the aspects of the services required in the description of the project for the design of the website detailed in 3.1;

B. *Design*: a high quality design proposal;

C. *Digital marketing strategy*: evidence that the tenderer understands the context in which the Agency operates and its overall strategic business objectives.

D. *User research and testing*: Evidence that the tenderer uses a clear methodology for gathering user feedback and for testing ideas and has a strategy for working with EMA stakeholders who are unable to attend face-to-face meetings.

E. *Infographics*: Evidence that the tenderer is able to produce high-quality infographics that will appeal to the target audience described.

## *14.2. Presentation*

A maximum of 10 points will be awarded for the presentation, giving a total score out of 100 for those tenderers who achieved the minimum score for quality (see 14.1). For the presentation tenderers must present the project plan for the development of the European medicines web portal which they are required to provide as part of the written tender response (see section 14.1.1 above).

The purpose of the presentation is to allow the evaluation committee to clarify the written tenders which have been submitted, that is to allow the committee to gain the clearest understanding of the tenders submitted, and in this regard ask tenderers any questions they may have.

Tenderers may not introduce any new element over and above their written tender responses. Tenders **may not be amended in any way** through the presentation.

Twenty minutes will be allotted for the presentation by the tenderers and the question and answer session will last a maximum of 20 minutes.

### *14.3. Price*

Following completion of evaluation of the qualitative criteria and the presentation stage, the tenderers shall be evaluated for price.

The award criteria for price shall be evaluated according to the following formula:

$$\frac{\text{Lowest price x weighting for price}}{\text{Tenderer's price}}$$

The total of all the prices in the costing sheet will be added together, before applying the formula indicated above. Tenderers will be ranked according to the outcome of the evaluation of the award criteria, including price.

Prices to be evaluated will be based on the grand total of the fixed price values (A) plus the total of the scenario (B) in costing sheet Annex I. This scenario is indicative only for the purposes of evaluation and is not binding on the Agency as a future purchase. The daily rates and the fixed prices provided in the scenario are legally binding on the Tenderer and will be payable for future purchases.

At the conclusion of this evaluation process a framework contract will be awarded to the tenderers with the highest overall scores in priority order.

## 15. Tender to be submitted

The letter of invitation to tender, to which this technical specifications document is attached, contains further information on:

- How to submit a response to the tender
- How to obtain additional information for the purpose of clarifying the nature of the contract

In order to assess each tenderer according to the above-mentioned criteria, the following information must be submitted by the tenderer:

- A letter enclosing the tender on the official letter headed paper of the tenderer and signed by an authorised representative of the tenderer.
- A completed Annex I, Costing Sheet
- Completed declaration in Annex II relating to Exclusion Criteria.

- An information sheet on the tenderer indicating the information listed here below. Tenderers must use the sheets entitled “01a – Identification” and “01b – Joint applicants” in the Response Questionnaire in Annex III: Response Questionnaire.
  - the name and registered business address including telephone number, e-mail address and website address;
  - any other different current or previous trading name in the past three years;
  - the name and contact details of the person whom may be contacted with any queries regarding this tender;
  - the legal status of the tenderer;
  - if the tenderer is a company the company registration number, VAT registration number and date of incorporation;
  - if the tenderer is a member of a group of companies and if so the relationship between the tenderer and the ultimate holding company, the name and address of the holding company and its registration number, whether the ultimate holding company would be prepared to guarantee the liabilities in connection with this contract;
  - details of organisational structure including organisation chart;
  - number and locations of premises;
  - number of employees;
  - name of the person authorised to sign contracts on behalf of the tenderer.
- A completed Annex III, Response Questionnaire
- Documentation requested to enable assessment of Selection Criteria (point 13 above).
- Documentation requested to enable assessment of Award Criteria (point 14 above).
- A statement to confirm that information provided in response to this tender is accurate and complete as at the date of submission and acknowledgement that the provision of false information, either knowingly or negligently, in response to this tender could result in the tenderer being excluded from future tenders for contracts with the Agency.
- Confirmation of acceptance of the draft contract and terms and conditions of tender.
- An undertaking to inform the Agency promptly following any matter which would alter or add to any of the information given in response to this tender.
- Documents as requested in relation to proposed subcontracting.
- Tenders submitted by consortia or by groups of service providers must indicate the role, title and experience of each member or of the group.
- **To be submitted in separate binders or folders, which must be clearly labelled**, a detailed financial tender using the **Costing Sheet** attached in Annex I, and exclusive of VAT, signed by an authorised representative of the tenderer.
- Tenderers are requested to make use of the checklist given in Annex IV to ensure that no enclosure has been omitted in their tender.

# Annexes

I. Costing Sheet to be used by tenderers

II. Exclusion criteria statement and detail of supporting documentation required

III. Response Questionnaire

IV. Summary Checklist of Documents which tenderers must submit

V. Draft contract