

Annex II to the Invitation to Tender

Frontex/OP/638/2017/RS

Terms of Reference

Framework Contract for layouting services and graphic design support

1. GENERAL INFORMATION ABOUT FRONTEX

The European Border and Coast Guard Agency - Frontex (hereinafter referred to as “Frontex”) was established by the Council Regulation (EC) Regulation (EU) 2016/1624 with a view to improve the integrated management of the external borders of the Member States of the European Union.

Further information about Frontex can be found on the Agency’s web site www.frontex.europa.eu

2. BACKGROUND

The European Agency Frontex is responsible for coordination of operational cooperation at the external borders of the European Union.

Frontex produces a wide range of communication products for different audiences, contexts and events, operational and public, which are organised alone or in partnership with other law enforcement institutions, EU institutions and bodies, industry associations etc.

Frontex applies its visual identity to all services and items produced.

3. DESCRIPTION OF THE ASSIGNMENT

3.1. General objectives

The purpose of the foreseen contract is to purchase desktop publishing services and graphic design support for Frontex external and internal communication products, such as publications (e.g. books, brochures, leaflets, posters), templates (MS Office tools) or any display material that is print-based (gifts, rollups, banners, etc).

Frontex’s actively works to communicate and provide information about the activities in the fields under its competence to a wide range of audiences, from the general public to specialized experts, academia or decision makers. Therefore it relies on communication products to bring and present such information in a way that is clear, professional and relevant for the readers of a given target group.

Each communication product should contribute to creating a visual style that is distinctive of Frontex, therefore all Frontex products must apply the Frontex Visual Identity (VI) consistently. Equally, all Frontex communication products must be developed up to the highest quality standards, ensuring they have a positive impact on the reputation of the Agency.

3.2. Specific objectives

The purpose of this contract is the provision of:

- desktop publishing and graphic design services to support Frontex in producing high quality books, leaflets, brochures, and any other information, promotion or display material that is mainly of printed nature,
- provide support in terms of multilingual publication versioning
- adaptation of digital print products to epub and interactive PDF formats
- development of templates (both for Adobe products, or MS Office products)
- VI updates and maintenance in terms of template enhancements and developments.

4. TYPE OF CONTRACT

Frontex will conclude a multiple Framework Contracts with the selected Tenderers on the basis of the draft contract included in the *Annex VII* to the invitation of tender.

The open tender procurement procedure will lead to the conclusion of a cascade framework contract awarded to the winning Contractors. The order in which Contractors are contacted is based on the ranking list established in the evaluation report.

Before an Order (which will set out the detailed specific conditions for performing the individual assignment) is to be issued, Frontex shall contact the first Contractor from the ranking list with the Request for Services. If the first Contractor is not in a position to meet the criteria for response time and specifications, and cannot accept them or will not duly respond to the Request for Services, Frontex shall then contact the second Contractor. This shall not involve the termination of the contractual relation with the first Contractor.

In the event of failure of a foreseen activity after contacting all Contractors from the cascade, Frontex may redefine the project and its constraints (time, deadline, technical requirements and resources) or start the procedure again for the same project with different constraints at a later time.

The list of winners will consist of at least two and maximum three (insofar as there is a sufficient number of admissible tenders which meet the award criteria) potential Contractors.

4.1. Duration

This cascade framework contract(s) will be concluded for a period of two years, extendable up to four years (formula: 2 years + 1 year + 1 year).

4.2. Location

The tasks and services to be provided are to be carried out in the Contractor's premises, and the outcomes and deliverables sent to the Frontex headquarters in Warsaw.

4.3. Working language

The working language foreseen to be used by all parties for the implementation of this contract is English.

4.4. Payments

Payments for each individual assignment will be made after the Contractor has fulfilled all his contractual obligations.

5. DEFINITIONS

5.1. What is intended as “desktop publishing services (DTP)”?

The Contractor's main task is to layout documents into professional communication products, by creatively applying the VI style guide.

This means the Contractor will receive documents from Frontex (usually in MS Word, Excel, Powerpoint, Publisher plus images, data sets, maps and photos), and transform them into professional publications and communication products up to the highest standards and in accordance to Frontex VI or other styleguides provided by Frontex. In many occasions the Contractor will use ready-made designs, templates and fonts provided by Frontex.

The creation of standard charts, graphs, tables and basic photo-retouch is considered an integral part of DTP. Advanced or complex graphics will be addressed separately as a graphic support task or project.

Language versions, and adaptations of print based projects into more interactive formats (e-pub, interactive PDFs depending on the case), are also considered part of the core DTP services.

The final deliverables are:

- electronic print files,

- files ready for online or electronic distribution (such as screen PDFs, epub, or infographics),
- project masterfiles including all collateral artwork.
- templates (Adobe-based or MS Office based).

5.2. What is intended as “graphic design support”?

In this cases the Contractor will:

- Design new communication products for which there are no pre-existing templates,
- Enhance or re-design already existing products or templates;
- Create visuals (such as charts, maps, infographics, illustrations) that demand more time and work than the standard visuals that are part of DTP, and might be considered a standalone product in itself.

The Contractor will be responsible for the creative process, from preliminary concepts and ideas to final delivery of visuals, graphic designs, grids and layouts and/or template production.

The Contractor is always expected to present a minimum of three structurally different concept proposals at the initial stage of each design project, for Frontex to choose the one to be further developed. By “structurally different” is meant that each proposal differs from the other radically and not just in the details (such as changes of colour, typography or detail variations).

5.3. What is intended as “publication”?

For the purpose of this contract, “publication” is defined as “all documents, regardless of their medium and format, offered for general distribution, thus requiring, as a minimum, a catalogue number and other identifiers (ISBN, ISSN, DOI) where appropriate. General distribution does not necessarily mean general public in terms of audience.”

All other deliverables that are subject of this contract will be referred to as “communication products” or “products”.

5.4. What is intended as “quality control” and “compliance”?

The Contractor will ensure constant quality monitoring to make certain that:

- there are no errors in the publication’s format, structure, layout;
- the style and aesthetic quality goes in line to agreed needs and expectations for a particular product specifications/audience.

The Contractor will ensure that all deliverables and proposals undergo constant compliance monitoring to make certain that:

- there are no errors in the publication’s content, identifiers;
- the EU Interinstitutional Styleguide guidelines are properly applied;
- the Frontex visual identity (VI) guidelines are properly applied;

The Contractor will nominate an employee with the relevant knowledge and experience, who will bear responsibility for supervising all deliverables according to the three points mentioned above.

This person, together with the project manager, will ensure that each and every version of a project undergoes such checks prior to submission to Frontex for further comments or approval.

Frontex reserves the right to reject or terminate a project and apply contractual measures in case of repeated mistakes, omissions or poor quality due to evident lack of attention on the Contractor’s side.

5.5. What is intended by “technical and creative advice and consulting”?

The Contractor is expected to provide advice and guidance to Frontex on the best technical solutions and creative approach to achieve success with economy and efficiency.

The technical advice on specific paper format sizes and weights, printing and binding techniques, finishing and effects or the final product to be print or digital, is expected as a standard for all projects and activities in this Contract.

In case of graphic design projects, the Contractor is expected to provide creative directions to take for the development and implementation of graphic concepts that address specific communicational needs, in line with the Frontex Visual Identity Guideline.

6. SERVICES TO BE DELIVERED

6.1. General requirements

The contractor will provide DTP and graphic design support for Frontex's external and internal communication products (please find examples here: www.frontex.europa.eu).

Many of Frontex communication products are drafted and copy-edited in Microsoft Word while the DTP required templates and layouts are usually done or adapted in InDesign. Once the layouting processes are concluded, all external publications are published on the Frontex website in pdf format, but more and more publications are released in e-pub formats as well. The print-runs are usually between 300 and 1000 copies. The Contractor may be requested to produce E-Pub or interactive PDF versions of the product. It may be required to modify/insert interactive elements such as video, hyperlinks, rollover images, document navigation, among many other possibilities. The digital files should be prepared in such a way that they can be used properly on tablets, smart phones and equivalent end devices.

On the occasion of institutional events, internal activities or certain meetings, Frontex creates series of occasion-related products such as (but not limited to): posters, banners, compliment cards, (online/paper-based), greeting cards, calendars, conference folders, etc. These products usually have a special design (combining Frontex visual identity with the specific elements linked to the event), and are printed in a limited number of copies.

Most of Frontex external publications are in English only, but there are projects in which 23 language versions are produced (Bulgarian, Croatian, Czech, Danish, Dutch, English, Estonian, Finnish, French, German, Greek, Hungarian, Italian, Latvian, Lithuanian, Maltese, Polish, Portuguese, Romanian, Slovakian, Slovenian, Spanish and Swedish).

In the case of multilingual versions, a product might use an MS Word template instead of an InDesign template, to keep costs down in terms of layouting, especially if the quantities of language versions are counted in the dozens.

Frontex is making more and more use of explanatory graphics (infographics) to convey quickly and concisely information in a visual way.

In regards of the proofreading workflow, Frontex begins by proofreading the text draft file (usually an MS Word file), prior to layout submission to the contractor. After the layout is finished, the final version is proofread up to two times.

In cases of publications for which a high quality printing job is expected, Frontex may request the Contractor to provide colour proofs for specific parts of the products. The costs for the sample(s), including the transportation and delivery costs will be covered by the Contractor.

Frontex will always submit the comments and the request for changes during face-to-face meetings as well as in writing. The Contractor shall each time acknowledge the receipt of the written instructions for changes.

6.2. Tasks and responsibilities

The main tasks and activities under this contract fall under the following areas:

- To give advice on technical solutions as well as on most suitable solutions to be applied in print/design projects (to be expressed by the Contractor in the response to the Request for Services).
- To layout text and content provided by Frontex into creative and professionally looking publications, aligned in style to the Frontex Visual Identity (VI).
- To create graphs, maps, tables, photos that help to communicate data and information in a clear and attractive way, always aligned with the Frontex Visual Identity (VI).
- To prepare the digital print files of publications.
- To adapt publications for online or electronic distribution.
- To prepare linguistic versions (translations) of publications.
- To ensure that the products undergo a constant quality control and monitoring.
- To provide master files and collect packages with collateral artwork of all completed projects for archiving and future re-use or modification.
- Constant and incremental improvements of the Frontex VI by proactively proposing layout enhancements or new design solutions.

The support tasks and activities under this contract fall under the following areas:

- To design layout grids, templates (Adobe and MS Office) and other graphic files of multiple use, according to Frontex VI.
- Graphic design of visuals and minor publications.
- Infographics design, adapting different kinds of information and data into visual means to convey a message visually.
- Search and acquisition of third party products (such as stock illustrations, photos, video or audio) to be used in Frontex publications, and providing Frontex with all relevant documentation (invoices, copyright clearances).

For a detailed list of tasks and deliverables, please see *Annex IV - Financial proposal*.

7. DELIVERABLES

The deliverables of the prospective contract are considered all creative works, illustrations and designs, layouts, templates and others as detailed in *Annex IV*. All these elements shall become the property of Frontex (terms described in art. II. 10 of *Annex VII - Draft contract*).

The deliverables are to be provided to Frontex electronically by e-mail, secure FTP or similar secure transfer protocol, or on appropriate electronic data storage devices (e.g. HDD, USB key).

The deliverables shall be delivered in the appropriate formats and versions (PDF, InDesign, MS Word, MS Powerpoint, jpeg etc. as stated in the respective order form).

The Contractor ensures the delivery of digital proofs or other physical items to Frontex premises (currently located at Plac Europejski 6, 00-844 Warsaw, Poland).

7.1. Estimated yearly volume of work

Based on averaging overall Frontex layout productions from the last two years, and this year's planned projects, the foreseen yearly volume per type of publication is as follows:

Type	Quantity yearly	Comments
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Posters, banners, rollups	20	
Publications (similar in complexity to the General Report)	15	In certain cases 3-5 language versioning adaptations may be asked
Leaflets	15	
Brochures (24/36 pages)	2	3-5 language adaptations
Books (mainly training manuals, 100 pages average)	5	5-9 language adaptations
Reports of up to 20 pages, proficient in tables and charts	5	approx. 20 language adaptations
Newsletters	2	
Small random design projects (like gifts, small ad-hoc corporate elements, stickers, icons)	10	

8. PROFESSIONAL PROFILES AND EXPERTISE

The Contractor should be a company specialized in graphic design or publishing, or a sector closely related to communications production. The contractor should have sound experience in DTP activities, supported by a rich portfolio. The Contractor should also provide art direction capabilities to ensure good quality of visuals and graphic design. Its staff must be highly proficient with the Adobe Creative suite software (InDesign, Illustrator, Photoshop, among others), and possess extensive experience with printing techniques and procedures. The Contractor should demonstrate experience in epub and interactive PDF files production, and experience in the application and use of MS Office tools as means for graphic communication as well.

Staff Members of the Contractor, assigned to the prospective cascade framework contract, must have a good level of English at B2 level minimum.

Language skills level definition shall be understood in accordance with the scale proposed in the "Common European Framework of Reference: Learning, Teaching, Assessment", Council of Europe reference document http://www.coe.int/t/dg4/education/elp/elp-reg/Source/Key_reference/CEFR_EN.pdf). For the convenience of a reader B2 levels definition is presented below:

- B2 level: Can understand the main ideas of complex text on both concrete and abstract topics, including technical discussions in his/her field of specialization. Can interact with a degree of fluency and spontaneity that makes regular interaction with native speakers quite possible without strain for either party. Can produce clear, detailed text on a wide range of subjects and explain a viewpoint on a topical issue giving the advantages and disadvantages of various options.

Frontex may ask for replacement of a team member should the Contractor's level of English be insufficient to perform the tasks assigned.

8.1. Minimum staff composition and profile requirements

To carry out the contract, the Contractor should provide Frontex with the following professional profiles:

8.1.1. Project manager

The Contractor shall assign a project manager for the implementation of the present contract, able to speak fluent English, who should be a full time employee of the bidding company, and who should not be involved in the graphic design or production team.

The role of the project manager is to receive instructions and feedback from Frontex, and then assign the instructions to the appropriate Contractor's staff, ensuring that the quality of the deliverables are in accordance with set expectations, as well as to observe deadlines and follow up the execution of tasks accordingly.

The project manager should have at least 5 years' experience in the publishing, advertising or design business.

8.1.2. Senior art director / lead graphic designer

The Contractor shall assign a senior graphic designer / art director for the implementation of the present contract, able to speak fluent English, who should be a full time employee.

His/her main responsibility is to supervise and lead the work of the team from an aesthetic, graphical and communicational perspective, ensuring that Frontex projects present a high quality in its layouts and graphics. This professional will be responsible for the team's creative conception and design of new layouts and grids, and for proposing improvements of templates in use. He/she should have minimum 10 years of experience in publishing design, art directing, graphic design, brand identity, visual identity.

8.1.3. Graphic designer / layouter

The Contractor shall assign at least one graphic designer/layouter for the implementation of the present contract, who should be a full time employee.

Besides core tasks, his/her responsibility is to design (create) projects like brochures, leaflets, banners; and to be able to resolve creatively demanding visuals like infographics, complex charts and maps. Experience in interactive publications is a valuable asset. He/she should have minimum 5 years of experience in the realization of publications and magazines.

8.1.4. Support staff (developer for interactive elements / technical operator for DTP and pre-press operator)

The Contractor shall assign at least one support staff for the implementation of the present contract, who should be a full time employee, whose profile should support the flexibility and efficiency of the rest of the proposed team.

Besides core graphical tasks, his/her strength resides in in-depth knowledge of software, flexible use of grids and styles automation, extensive technical knowledge of print techniques and preparations, coupled with a falcon-eye for detail. His/her responsibility is to deliver perfect, state-of-the-art print files, and reliable templates. Experience in interactive publications is a valuable asset. He/she should have minimum 5 years of experience in the field of graphic design or communication related fields.

8.2. Long term absence or change of Contractor's staff

In case of replacement or unavailability of a staff member, Frontex must be immediately informed in writing by the Contractor.

The Contractor shall ensure a backup in case of long-term unavailability of the project manager or any of the key members of the technical staff described above.

The replacement must be equivalent to the staff member initially assigned to the project in terms of experience and qualifications in order to ensure that such change does not undermine the Contractor's team's performance. The new member's CV, portfolio and any other relevant and justified documentation must be provided to Frontex. Each such replacement will be subject to Frontex' prior written approval.

9. TECHNICAL RESOURCES

At the moment the foreseen Cascade Framework Contract enters into force, the Contractor should possess the necessary technical capacity (e.g. capable computers, relevant equipment and software) to start working. The software should be compatible with Frontex current software packages (Microsoft Office 2010 or 2013, Adobe Creative Suite CS6 or CC), to avoid delays due to technical incompatibilities. The Contractor should have in place the necessary communication tools and procedures to communicate with Frontex, and to ensure that the deliveries can take place according to specifications and channels (e.g. SFTP or secure dedicated on-line channel allowing exchange of heavy files; videoconferencing, telephones and e-mail for regular communication) as requested in this Contract.

The execution of the contract requires the capacity to design and print texts in several European languages. The Contractor shall ensure the ability to use typefaces (including any special characters) for alphabets used by languages including Polish, Greek, German, French, Bulgarian, and Croatian. The Contractor will ensure the availability of Fedra Sans Pro family font as described in the Frontex Visual Identity Guideline.

10. PROJECT MANAGEMENT

The execution of this contract requires the capacity to manage several orders simultaneously and to ensure coordination between all parties involved as well as the proper follow up and coordination of the briefing, production, correction and delivery of a project. The Contractor shall ensure the quality control in all phases of a project, and the quality check of the final product.

10.1. Order forms and request procedures

Frontex will start a project by sending to the first Contractor from the cascade a Request for Services (see Annex III to the draft Contract). On basis of the positive answer of the Contractor, Frontex will prepare the Order (*see Annex III to the draft Contract*). The detailed quantity and type of deliverables requested will be specified in this Order. For details on the procedure for Request for Services and for Order placement, please refer to the workflow defined in point 9.2.

The Contractor shall execute the relevant services and provide the final deliverables according to the Request for Services and according to the Order under the current Framework Contract.

The deliverables shall be provided to Frontex via the channels, within the time schedules and in the formats agreed in the respective order forms.

The Contractor ensures the delivery of non-electronic materials to the Frontex premises (currently located at Plac Europejski 6, 00-844 Warsaw, Poland).

10.2. Frontex publication's workflow and project timings

With the aim to inform Contractors transparently about the publication process typically applied in Frontex, please refer to the workflow below. It provides a realistic idea of the time invested in producing different types of publication, depending mostly on the quantity of proofreads needed, and the quantity of illustrations to be developed.

- (i.) The prospective assignment starts with the Request for Services sent to the Contractor, with text document, for workload estimation (the provided text is already edited and proofread, usually as preformatted MS Word with an established index structure, may contain presentation slides, graphs, photographs etc).
- (ii.) The Contractor has maximum 2 working days to respond to the Request for Services, expressing its willingness to engage in the project and sending a preliminary workload/time estimate. If the Contractor refuses to respond or expresses the estimated workload in a way not acceptable for the Contracting Authority, Frontex can contact the next Contractor from the cascade, and repeats point (i). In the event of failure to observe the given deadline, the first Contractor shall be considered unavailable.
- (iii.) If the Contractor responds positively and his response is accepted by the Contracting Authority, Frontex attaches the provided workload estimation to the issued Order, which then is delivered to the Contractor. This process involves internal financial procedures and takes up to two weeks. An Order is a binding financial commitment.
- (iv.) Within 2 working days from receiving signed Order by Frontex the Contractor sends the co-signed Order. At this point a project is a financial commitment, and work can start.
- (v.) Proposal(s) or first drafts of the requested outputs are sent by the Contractor to Frontex electronically. If Frontex develops the illustrations and visuals on its own, the Contractor is requested to use placeholders to be substituted as visuals are delivered, and move forward with the layout. The development of complex visuals may take up to one month.
- (vi.) Frontex submits comments and changes, usually directly inserted in PDF files.
- (vii.) The Contractor acknowledges the receipt of the written instructions for changes. After introducing them, the Contractor sends the working files for further comments or final approval. Three cycles of corrections are considered standard, and the time involved in the process depends obviously on the complexity and size of the project.
- (viii.) Once approved, the product goes to proofreading (applicable to publications only). Proofreading services are provided by the European Publications Office, and take up to two weeks in average. Other communication products are proofread locally, which is usually up to one week.
- (ix.) Corrections introduced by the Contractor, and working files sent to Frontex.
- (x.) In the case of high profile publications, a second proofread is required and performed, which adds another two weeks to the timeline.
- (xi.) Corrections introduced by the Contractor, and working files sent to Frontex.
- (xii.) After approval with internal stakeholders, Frontex accepts the project.
- (xiii.) The contractor sends the final deliverables (print files or digital distribution files, according to the order form) the relevant collect package for archive.
- (xiv.) Upon receipt from Frontex of the deliverables Frontex confirms the project's closure, and the Contractor sends an invoice for payment.
- (xv.) Payment is processed and done by Frontex (as per contract provisions and stated in the invoice, payment within 30 calendar days).

10.3. Meetings and communication channels

a. Working meetings

The briefings, decision making presentations and final acceptance of concepts and deliverables will be held in face-to-face meetings (or teleconference meetings).

If the contractor is located in Warsaw, the place for working meetings will be Frontex Headquarters.

If the Contractor is based outside Warsaw, the working meetings will be held via videoconference.

Regular work-in-progress communication and reporting will be held via e-mail or phone.

b. Meeting minutes

If Frontex submits comments and requests for changes during face-to-face meetings or via phone, it is the Contractor's project manager responsibility to submit in writing (e-mail) the minutes of the meeting, possibly attaching scans with corrections if applicable. The minutes will be provided no longer than 24 hours after a meeting took place.

Frontex shall approve the content of the minutes.

c. E-mail working standards

For the execution of this contract, e-mail is foreseen to be the main communication channel. With the aim to streamline and categorize correspondence between the parties from start, a standard for working emails should be discussed and agreed between Frontex and the Contractor at the kick-off meeting of the contract.

d. File exchange platform

The Contractor will set a secure and dedicated Frontex file exchange platform to deliver files too big for e-mail attachments. Content from third parties or unrelated to the present project is not allowed in the file exchange platform. The FTP should be accessed only by personnel involved in the project, specified in the prospective contract. It will also be required to set simple standards at the kick-off meeting for a common way of naming and versioning files, and an agreed folder/subfolder structure to be applied for each project.

e. Project status tracking

It will be required (possibly also at the kick-off meeting) to set a common standard for tracking the status of projects (tasks "to be done", "in progress", "to be accepted", "accepted", etc) in an easy readable and visual way, to be agreed between the Contractor and Frontex.