DATE: 26 March 2024

REQUEST FOR PROPOSAL: RFP/24/006/RBAP/PSP

FRAME AGREEMENT FOR THE PROVISION OF

DIGITAL MEDIA BUYING SERVICES FOR UNHCR PRIVATE SECTOR PARTNERSHIPS IN HONG KONG

CLOSING DATE AND TIME: 19 April 2024 – 23:59 UTC + 8 hrs. (Hong Kong time zone)

INTRODUCTION

The United Nations High Commissioner for Refugees, UNHCR, was established on 14 December 1950 by the United Nations General Assembly. The UN Refugee Agency is mandated to lead and co-ordinate international action to protect refugees and resolve refugee problems worldwide. Its primary purpose is to safeguard the rights and well-being of refugees. It strives to ensure that everyone can exercise the right to seek asylum and find safe refuge in another State, with the option to return home voluntarily, integrate locally or to resettle in a third country. For over 70 years, UNHCR has helped millions of people to restart their lives. They include refugees, returnees, stateless people, the internally displaced and asylum-seekers. Its interventions in the areas of protection, shelter, health and education have been crucial, healing broken pasts and building brighter futures.

Please find more via UNHCR website: www.unhcr.org and www.unhcr.org/hk

Private Sector Partnerships Service (PSP) sits within UNHCR's Division of External Relations (DER) and is responsible for mobilizing resources from the private sector for refugees. UNHCR has developed a Private Sector Fundraising Strategy focusing on both Individual Giving and Private Sector Partnerships, identifying priority fundraising markets and regions.

More information can be found on UNHCR globally; www.unhcr.org and about UNHCR Hong Kong www.unhcr.org/hk

1. REQUIREMENTS

UNHCR is aiming to boost the digital presence of UNHCR to deliver long-term sustainable solutions that provide security, dignity, and a future for refugees. With our strategy of 'Digital Transformation' we will look first for digital opportunities in everything we do. Our local investment will prioritize rapid expansion areas of digital supporter engagement and building new acquisition.

UNHCR is seeking to contract with a local digital media planning and buying agency ("Vendor") for the markets in Hong Kong and Macao Special Administrative Regions to help manage integrated acquisition campaigns to better assimilate all media channels, including both supporter engagement and fundraising campaigns ("Services").

UNHCR will be engaging the selected Vendor(s) to lead on the local paid media campaigns, digitally, including new donor acquisition, lead generation, and supporter engagement.

The holistic objectives will have two (2) parts, with each budget split and KPI as below based on last click attribution. Please note that the figures are PSP HK best estimates based on experience and forecasting and it cannot be considered as commitment. The actual workload/volume will be defined via different projects and confirmed on the corresponding statement of work and purchase order.

The total estimated media budget within this scope is estimated for HKD 6,491,700:

A. Digital Acquisition Campaign

1 May 2024 – 31 Apr 2025: HKD 1,386,000 (all fees inclusive)
1 May 2025 – 31 Apr 2026: HKD 2,080,000 (all fees inclusive)
1 May 2026 – 31 Apr 2027: HKD 2,392,000 (all fees inclusive)

Digital acquisition shall meet the below KPI with all fees inclusive:

- ROI minimum 1 within the first year of service period
- Number of donors: 7,998
- Monthly donor ratio: 11%
- Average one-off gift amount: HKD 1,373
- Average monthly gift amount: HKD 293

B. Engagement Campaign:

1 May 2024 – 31 Apr 2025: HKD 150,000 (all fees inclusive)
1 May 2025 – 31 Apr 2026: HKD225,000 (all fees inclusive)
1 May 2026 – 31 Apr 2027: HKD 258,700 (all fees inclusive)

Engagement KPI: Engagement rate to reach 10% that will assist conversion

Service period: 2-year frame agreement starting from the effective contract date, tentative on 1 May 2024. The frame agreement may extend for 1 more year, subject to performance review.

IMPORTANT:
The Terms of Reference (TOR) and other relevant documentation are detailed in the Annexes of this Request for Proposal (RFP).

IMPORTANT:
When a Frame Agreement (FA) is awarded, the successful bidder(s) are requested to maintain their quoted price model for the duration of the FA.

IMPORTANT:
When a Frame Agreement (FA) is awarded, either party can terminate the agreement only upon 90 days (3 months) notice, in writing to the other party.
The initiation of conciliation or arbitral proceedings in accordance with **article 18** "settlement of disputes" of the UNHCR General Conditions of Contracts for provision of Services shall not be deemed to be a "cause" for or otherwise to be a termination clause.

It is strongly recommended that this Request for Proposal and its annexes be read thoroughly. Failure to observe the procedures laid out therein may result in disqualification from the evaluation process.

Sub-Contracting: Please take careful note of article 5 of the attached General Conditions of Contracts for provision of Services.

2. BIDDING INFORMATION:

2.1. RFP DOCUMENTS

The following annexes form integral part of this Invitation to Bid:

Annex **A**:	Terms of Reference (TORs)
Annex **B**:	Technical Response Form
Annex **C**:	Financial Offer Form
Annex **D**:	UNHCR Special Data Protection Conditions
Annex **E**:	UNHCR General Conditions of Contracts for the Provision of Services
Annex **F**:	UN Supplier Code of Conduct
Annex G:	Vendor Registration Form
Annex **H**:	Registration Guide for eTenderBox
Annex **I**:	eTenderBox Supplier User Manual

Please kindly note that this RFP is posted on UNHCR Global and UNGM websites too.

2.2 ACKNOWLEDGMENT

We would appreciate your informing us of the receipt of this RFP by return e-mail to Yun Ling ling@unhcr.org and Rachel Bagnall bagnall@unhcr.org as to:

- Your confirmation of receipt of this request for proposal
- Whether or not you will be submitting your proposal

IMPORTANT:
Failure to send the above requested information may result in disqualification of your offer from further evaluation.

2.3 REQUESTS FOR CLARIFICATION

Bidders are required to submit any request for clarification or any question in respect of this RFP by e-mail to Yun Ling ling@unhcr.org and Rachel Bagnall bagnall@unhcr.org **The deadline for receipt of questions is the 08 April 2024 23:59 UTC + 8 hrs. (Hong Kong time zone).** Bidders are requested to keep all questions concise.

IMPORTANT:
Please note that Proposal Submissions are **NOT** to be send to the e-mail addresses above.

UNHCR will compile and answer all questions received. UNHCR may, at its discretion, copy and reply to all or a question(s) to all other invited bidders at once for transparency purposes in line with applicable confidentiality clauses.

The consolidated Q&A file will be also posted on UNHCR Global website and UNGM.

IMPORTANT:
UNHCR may invite all bidders who have sent their confirmation of receipt of the RFP and expressed their interest in submitting a proposal to a Supplier Conference to explain ToRs, the RFP process and answer any questions raised by the potential bidders.

2.4 YOUR OFFER

Your offer shall be prepared in English or in Chinese.

Please submit your offer using the Annexes provided. Offers not conforming to the requested formats may not be considered.

IMPORTANT:

Inclusion of copies of your offer with any correspondence sent directly to the attention of the responsible buyer or any other UNHCR staff other than the prescribed submission method will result in disqualification of the offer. Please send your bid only in the manner specified in the "Submission of Bid" section 2.6) of this RFP.

Your offer shall comprise **the following two sets of documents:**

- Technical Offer
- Financial Offer

2.4.1 Content of the TECHNICAL OFFER

IMPORTANT: No pricing information should be included in the Technical offer. Failure to comply may risk disqualification. The technical offer should contain all information required.

Pre-selection criteria (mandatory to fulfil with this criteria):

Please take note of the pre-qualification criteria hereunder, failure to comply with the below criteria will result in disqualification:

1. **Locally based and registered**: your company must be registered in China mainland and/or Hong Kong SAR and/or Macau SAR and licensed to provide staff administration services. To establish compliance please **send your company registration certificate and fill out UNHCR Vendor registration form (Annex G)**

2. Acceptance of **UNHCR general terms and conditions (Annex D)**

3. Acceptance of **UNHCR data protection clause (Annex E)**

4. Acceptance of **UN Suppliers Code of Conduct (Annex F)**

Requirements

Service Requirements
It is essential that Vendor who responds to this tender can demonstrate their core digital competency in full Services integrated acquisition with digital media planning and buying capacity.

Account Management

- Deliver campaign strategy and content plans for UNHCR digital campaigns/events.
- Regular evaluation meeting to review performance, advise and implement on how best to monitor, report on and optimize digital media and social media marketing and engagement activities internally.
- To support UNHCR with negotiating innovation strategies and partnerships including exclusive advertising deals with partners and media marketing suppliers such as Facebook, Google, Bing/Yahoo, YouTube, Instagram LinkedIn and other platforms when appropriate.
- To produce documentation such as local market trends / insights, user guides and to provide training when required.

Media Planning and Buying

- Design, develop and execute digital marketing strategies which achieve local UNHCR acquisition and retention objectives with an emphasis on acquiring regular givers. To include, paid search engine advertising, social media advertising, influencers' content amplification, online display, programmatic, re-targeting, real-time bidding, mobile and in-application advertising, digital video advertising, affiliate marketing, permission based eDM, content marketing and native advertising, online sponsorship marketing and other suitable forms of paid advertising for the purposes of awareness building, brand building, supporter growth, lead generation and supporter conversion.

- Develop and execute strategy and media plans which leverage a diverse set of supporters' acquisition strategies and channels to reach and convert new audiences, including both non-emergency and emergency campaigns
- Develop and execute campaign testing plan, including optimizing elements based on performance. To include automated multi-variant testing, creative 'theme' testing, audience and target testing, creative, context, channel and media testing.
- Provide best paid keywords, in both Traditional Chinese and English, for top performing keywords, ad copies and A/B tests using experiments and draft function, or other technology as required.
- Support UNHCR to implement the latest search trends i.e., Voice Search, Image Search, and Facebook Search etc.
- Manage all aspects of paid media campaigns including building awareness to assist conversion.
- Provide ongoing strategic advice, optimizations and media planning based on results; constantly optimize for the best possible results and adjust media plan and media buying accordingly.
- Provide management of UNHCR's ad accounts on Google, Yahoo/Bing, Facebook, Instagram, YouTube, LinkedIn, programmatic, mobile and in-app, digital video, display, content and native, and other ad platforms as needed.
- Align and support with UNHCR attribution requirements and supporter engagement journey through Omni-channel.
- Provide weekly reports, insights and post campaign report (within 7 working days upon campaign completion), including all key media and donation metrics and overall CPA/ROI.
- Continuously optimize, adjust and provide recommendations to marketing programs in order to achieve fundraising objectives, donation, brand, supporter, and audience expansion targets.
- Use Google Tag Manager (GTM) and Google Analytics (GA) as well as paid media tracking (such as Campaign Manager) for reporting and testing.
- Use UNHCR UTM naming conventions for all ads and marketing campaigns.
- Set up and push tracking tags for Ad platforms to all relevant landing and conversion webpages via UNHCR's Google Tag Manager (GTM) account for UNHCR staff to approve and publish.
- Document all Ad trackers implemented on UNHCR web properties with purpose, data being collected, 3rd party data processors involved, and types of processing, data storage locations and data retention policies.
- Provide best-practice reporting and analysis on both multi-channel and single channel media performance.
- Provide proposed account structure and manage the paid search engine marketing channel; implement and optimize this channel and ensure an overall desired ROI.
- Provide strategy and methodology for bidding/negotiating with Vendor to purchase space for banner advertising/programmatic display and other appropriate forms of online advertising; implement channel and achieve agreed upon CPA/ROI.
- Provide and execute media strategy for supporter journey such as traffic retention and retargeting
- Provide media strategy for native advertising and implement activities.
- Provide recommendations to UNHCR to test new digital marketing strategies for supporter acquisition.
- Provide support for UNHCR's in-house media buy, including but not limited to liaising with digital advertising platforms and settling media buy payments on behalf of UNHCR

UNHCR Responsibilities

- Providing media briefs and submitting budgets
- Provide landing page and e-commerce environment, and tracking requirements
- Approve all creatives / media assets, keywords, and ad copies.
- Provide access to Google Analytics for reporting and audience planning

- Reconciling reports submitted by the Vendor with UNHCR database reports and letting Vendor know of any required adjustment to the reported figures
- Provide existing campaign assets to be adapted to local market as needed
- Provide access to UNHCR content and brand guidelines (e.g., images and data) for the elaboration of campaigns
- Allow 3rd party trackers to be included in webpages

2.4.2 Content of the FINANCIAL OFFER

Your separate **Financial Offers** must contain an overall offer in a single currency, which shall be Hong Kong Dollar (HKD).

IMPORTANT:
The Financial Offer is to be submitted as per the Financial Offer Form. Financial offers and bids submitted in different manner and that have a different price structure may not be accepted.

UNHCR is exempt from all direct taxes and customs duties. With this regard, price must be given excluding any taxes and/or duties.

You are requested to hold your offer valid for ninety (90) days from the deadline for submission. UNHCR will make its best effort to select a company within this period. UNHCR's standard payment terms are within thirty (30) days after satisfactory implementation and receipt of documents in order.

The cost of preparing a bid and of negotiating a contract, including any related travel, is not reimbursable nor can it be included as a direct cost of the assignment.

2.5 BID EVALUATION:

2.5.1 Supplier Registration:

The qualified supplier(s) will be added to the Vendor Database after investigation of suitability based on the submitted Vendor Registration Form and supporting documents. The investigation involves consideration of several factors such as:

- Financial standing;
- Core business;
- Track record;
- Contract capacity.

2.5.2 Technical and Financial evaluation:

The Technical offer will be evaluated using inter alia the following criteria and percentage distribution: 70% from the total score (on a 100 points scale, i.e., max 70 points obtainable for the technical offer). Please find hereunder the detailed scoring breakdown.

Technical evaluation

Company Qualifications (max 20 points)	Documents, information to be provided to establish compliance with the set criteria
Service provision experience (client based) (20)	Service provision experience in digital media buying services. • Please list the current and previous clients.

	• Please provide three references (reference letter, email address, contact person, phone number) from your current/previous clients to be contacted. Reference and background checks are part of the due diligence during the selection process and in case of negative feedback may lead to disqualification. *Please note that without the list of clients, 0 point will be given.*
Proposed Services (max 40 points)	**Documents, information to be provided to establish compliance with the set criteria**
Compliance with the services required under digital media buying services (2.1) (20 points)	Comprehensive proposal presented including all services listed under point 2.1., outlining your company`s experience and strategy to fulfil requirements; please outline ability/capacity to provide timely hiring services.  Please include your company policy, Code of Conduct and the terms of conditions related the requested services.  *Please note that if you don`t add information about this section on Annex B, 0 point will be given.*
Media buying, implementation, management, and reporting (2.2) (20 points)	Comprehensive proposal to be presented to demonstrate capacity and capability to provide services as listed under 2.2, including: • one (1) sample campaign management summary report • one (1) digital media buying billing and report. *Please note that without samples, 0 points will be given*
Staff qualifications, account management (max 10 points)	**Documents, information to be provided to establish compliance with the set criteria**
Experience of core people who will work on UNHCR project. (Including experience with similar projects)	Experience of core people who will work on UNHCR project, including experience with similar projects. Please include: CV or bio of the people that will be assigned to UNHCR account (max half A4 page) *Please note that without the CVs, 0 points will be given.*

Bidders must have a minimum technical threshold of 42 out of 70 points for the technical proposal to be considered further in the financial evaluation process.

Companies might be requested to deliver a presentation based on their technical proposal via Teams. The dates for the presentations will be communicated in time.

IMPORTANT:

The minimum passing score of the evaluation is 42 out of 70; if a bid does not meet these minimums, it will be deemed technically non-compliant and will not proceed to the financial evaluation.

Bidders might be requested to deliver a presentation on their proposal and to introduce the team members who will work with UNHCR via web/teleconference in case PSP deems necessary the agencies will be informed on time.

The **Financial offers** will use the following percentage distribution: **30%** from the total score.

The maximum number of points (30 points) will be allotted to the lowest price offer that is opened and compared among those invited firms. All other price offers will receive points in inverse proportion to the lowest price, e.g., [total Price Component] x [PHP lowest] \ [PHP other] = points for other supplier's Price Component.

2.6 SUBMISSION OF BID:

Bids should be submitted by file upload to eTenderBox, the online bid registration tool of UNHCR. The eTenderBox can be accessed via the following URL:

http://etenderbox.unhcr.org

In order to use eTenderBox, registration on the website is required. This registration is exclusively for eTenderBox and does not replace any other registration with UNHCR.
A supplier should have only one registered email account in the system. The supplier must use only that eTenderBox account for managing its offers to UNHCR.

In case the password is forgotten that account cannot be used anymore, and new registration is required. The eTenderBox Registration Guide and Use Manual are available at the above URL and provided as annexes to this RFP.

IMPORTANT:
The technical and financial offers shall be clearly separated by uploading them to the appropriate category in the system. Failure to do so may result in disqualification.

Allowed extension for files to upload are .doc, .docx, .xls, .xlsx, .rtf, .png, .jpg, .jpeg, .pdf, .txt, .zip, .ppt, .pptx, .mbp, .rar, .gif, .tif and .tiff. Executable files (.exe, .bat, .cmd, etc.) should not be uploaded. The maximum size limit per file is 10MB.

Uploaded files can be amended by the Supplier while the tender is open. The selected files for upload are submitted when the 'Save & Submit' button is clicked on. Therefore, this button must be clicked before the deadline expires. If done so, the selected files will be submitted and uploaded successfully even if the deadline expires during the file upload. It is the Supplier`s responsibility to ensure that all files of the final offer are submitted by the tender expiration deadline.

Once the deadline for submission is expired, the bid will be automatically closed after which the uploaded files can be reviewed but options for additional upload and deletion of previously uploaded files are not available anymore. To ensure the safe submission of the full and final offer, it is recommended to have all files uploaded well before the tender deadline.

CLOSING DATE AND TIME: 19th April 2024 – 23:59 UTC + 8 hrs. (Hong Kong time zone)

IMPORTANT:
Any bid received after this date or sent to another UNHCR address may be rejected. UNHCR may, at its discretion, extend the deadline for the submission of bids, by notifying all prospective bidders simultaneously.

It is supplier's responsibility to verify that documents and correspondence have been submitted properly before the deadline.

UNHCR will not be responsible for locating or securing any information that is not identified in the bid. Accordingly, to ensure that sufficient information is available, the bidder shall furnish, as part of the bid, any descriptive material such as extracts, descriptions, and other necessary information it deems would enhance the comprehension of its offer.

2.7 BID ACCEPTANCE:

UNHCR reserves the right to accept the whole or part of your bid.

UNHCR may at its discretion increase or decrease the proposed content when awarding the contract and would not expect a significant variation of the rate submitted. Any such increase or decrease in the contract duration would be negotiated with the successful bidder as part of the finalization of the Purchase Orders for Services.

UNHCR may, at its discretion, extend the deadline for the submission of bids, by notifying all prospective suppliers in writing. The extension of the deadline may accompany a modification of the solicitation documents prepared by UNHCR at its own initiative or in response to a clarification requested by a prospective supplier.

Please note that UNHCR is not bound to select any of the firms submitting bids and does not bind itself in any way to select the firm offering the lowest price. Furthermore, the contract will be awarded to the bid considered most responsive to the needs, as well as conforming to UNHCR's general principles, including economy and efficiency and best value for money.

2.8 CURRENCY AND PAYMENT TERMS FOR PURCHASE ORDERS

Any Purchase Order (PO) issued because of this RFP will be made in the currency of the winning offer(s). Payment will be made in accordance to the General Conditions for the Purchase of Services and in the currency in which the PO is issued. Payments shall only be initiated after confirmation of successful completion by UNHCR business owner.

2.9 UNHCR GENERAL CONDITIONS OF CONTRACTS FOR THE PROVISION OF SERVICES

Please note that the General Conditions of Contracts for Provision of Services will be strictly adhered to for the purpose of any future contract. The Bidder must confirm the acceptance of these terms and conditions in writing.

Yours faithfully,

Goran Stojanovski
Senior Supply Coordinator
Regional Bureau Asia and the Pacific
United Nations High Commissioner for Refugees (UNHCR)