

**Annex A: Terms of Reference**

**RFP/24/019/RBAP/PSP**

**Development and Production of Direct Marketing Materials**

**UNHCR Private Sector Partnership in Korea**

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# 1 INTRODUCTION

## 1.1 Background

### Introduction to UNHCR

UNHCR, the UN Refugee Agency, is the world's leading organization dedicated to saving lives, protecting rights, and building a better future for people forced to flee their homes because of conflict and persecution. UNHCR operates in the field in over 137 countries and territories, using its expertise to protect and care for refugees, returnees, internally displaced people, and stateless persons. It delivers life-saving assistance like shelter, food, and water. For more information, please see <http://www.unhcr.org>

### Private Sector Partnerships (PSP) service

UNHCR is almost entirely funded by voluntary contributions from governments and private donors, most of whom give regular donations, and of companies, foundations and philanthropists partnering with UNHCR to deliver critical programmes and raise awareness of the refugee cause.

### Private Sector Partnership in Korea

Since the start of the Private the Sector Partnership operation in Korea in 2009, it has been PSP Korea's top priority to establish a long-lasting and strong partnership with donors who are truly engaged with the cause and get involved in refugee protection. Enhancing LTV and donor loyalty through a refined donor journey and diverse donor experience is critical to maintaining a high volume of donors and sustainable growth.

Therefore, it is imperative for PSP Korea to identify a competent external service provider with the knowledge and experience to create market-leading donor retention campaigns and relevant marketing materials for donor care purposes.

## 1.2 Statement of Purpose and Objectives

UNHCR Korea Donor Retention unit is seeking to appoint a competent in-country creative design service provider to provide design and production services on donor communication materials for two (2) years plus one (1) year extension upon satisfactory performance. The service provision will take place in the Republic of Korea.

Phase 1: 24 months (Feb 2025 - end Jan 2027)

Phase 2: 12 months (Feb 2027 - end Jan 2028)

Service providers are expected to provide the services as described under Point 2 – Requirements. The corresponding technical proposal needs to follow the structure of Point 2 - Requirements.

Please note: The list of products and numbers below are UNHCR PSP Korea's estimations based on its annual plan. Expected volumes and donors may vary during the duration of the contract. Suppliers are requested to indicate their maximum capacity and availability in their bids.

The awarded supplier will be requested to maintain their proposed pricing structure for the duration of the contract.

The Supplier is responsible for any unforeseen costs introduced by unexpected reasons. These are not to be passed along to UNHCR without explicit consent. The Supplier will be responsible for any new costs not captured in the contract. Any cost introduced after the contract agreement should be mutually agreed upon.

## 1.3 Pre-selection Criteria

Please note that compliance with the criteria listed below is mandatory. Failure to comply with any of them will result in disqualification.

Please fill out Annex B as your technical response and make sure that all requested documents are attached.

Pre-selection criteria	Documents, information to be provided to establish compliance with the set criteria
Eligible to provide service in Korea and locally based	Suppliers should be based in the Republic of Korea. Please fill out the vendor registration form (Annex I) and submit your Company registration certificate to establish compliance.  <i><b>Note:</b> in case your company is a registered PO-supplier for UNHCR (i.e., UNHCR has already sent purchase orders for local service provision or has a signed frame agreement in place), there is no need to submit a company registration certificate and vendor registration form unless any information has changed and needs to be updated. Compliance with the rest of the pre-selection criteria remains mandatory.</i>
Compliance with UNHCR General & Special Conditions of Contract for the Provision of Services	Please acknowledge the UNHCR General Conditions of Contract for the Provision of Services (Annex D) and send a signed copy along with your technical offer.
Compliance with UNHCR Special Data Protection Conditions	Please acknowledge UNHCR Special Data Protection Conditions (Annex E) and send along the signed copy with your technical offer.
Compliance with UN Supplier Code of Conduct	Please acknowledge the UN Supplier Code of Conduct (Annex H) and send along the signed copy with your technical offer.

## 2 REQUIREMENTS

### 2.1 Direct Marketing Products

Category	Material	Details/Specification
Printed DM	Mini card A	1 page, Rendezvous 210g, 112*162mm, Double-sided, Color printing
	Mini card B	1 page, Rendezvous 210g, 125*175mm, Double-sided, Color printing
	Mini card C	1 page, Rendezvous 210g, 104*140mm, Double-sided, Color printing
	Envelope A	Vellum 150g, 135*187mm, single-sided
	Envelope B	Vellum 150g, 150*200mm, single-sided
	Envelope C	Vellum 150g, 185*260mm, single-sided
	Gift Packaging Box A	Light packaging box containable in an envelope for light gift items
	Gift Packaging Box B	Craft box packaging box for bulky gift items
	Newsletter	4-page newplus 100g, B4, matte coating, 1-fold
Donor Gift Item	Donor Guidebook	8-page donor guide booklet, Vellum 180g, 130*180mm double-sided, Color printing
	Gift Package A	160-page Diary Notebook, Leather Cover, Vellum 100g (inner pages), 130*185mm

e-DM	Gift Package B	Recycled Plastic Keyring with UNHCR logo emboss, 50*50mm, HDPE
	Sticker Set	7 stickers (die cutting) with package, 90*90mm per sticker
	Mobile Card	8-page mobile card, 2 buttons connected to an external URL, a report containing CTR, time, duration of the stay and the number of visitors (Please specify any other elements that can be analysed)
	Mobile Card Domain Maintenance	Yearly maintenance of mobile card URL domains used throughout the year (for the mobile cards already created previously)
	Micro Site	A single-page responsive microsite. Users should be able to submit their name, phone number, email, and resident registration number. A simple tick box to collect the donor's consent is required
Packing and Mailing Service	Packing Service	Packing direct mailing items for dispatch
	Mailing Service	Direct mailing of the print materials produced

## 2.2 Concept and Creative Development

- Provide graphic and copywriting proposals for the deliverables listed in 2.1
- Development of compelling creative concepts per copywriting, creative design, and innovative ideas.
- Note: in some cases, creative is adapted from packs developed by UNHCR HQ or other country offices, or from previously produced materials by UNHCR Korea

## 2.3 Quantity

The estimate of quantities below is presented every year for simplicity, but it should be noted that the actual quantities will not be evenly spread out over the year. Detailed schedules will be shared with the appointed supplier and is negotiable upon the agreement of both parties.

Category	Material	Quantity		
		2025	2026	2027
Printed DM	Mini card A	30,000	35,000	45,000
	Mini card B	20,000	25,000	35,000
	Mini card C	20,000	20,000	20,000
	Envelope A	30,000	30,000	30,000
	Envelope B	20,000	20,000	20,000
	Envelope C	12,000	12,000	12,000
	Gift Packaging Box A	13,000	13,000	13,000
	Gift Packaging Box B	12,200	18,800	28,750
	Newsletter	12,000	12,000	12,000
	Donor Guidebook	30,000	40,000	40,000
Donor Gift Item	Gift Package A	3,000	3,000	3,000
	Gift Package B	5,000	5,000	5,000
	Sticker Set	30,000	30,000	40,000
e-DM	Mobile Card	10	10	10
	Mobile Card Domain Maintenance	3	3	3
	Micro Site	3	3	3
Packing and Mailing Service	Packing Service	35,000	35,000	50,000
	Mailing Service	35,000	35,000	50,000

\* Note: UNHCR Korea will provide relevant assets, including UNHCR brand guidelines, draft copy and images, and video files. Quantities for production may change and be done in multiple rounds within the year.

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## 2.4 Timing for Implementation of Services

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Please indicate in your technical proposal the time required for each expected deliverable listed in 2.1 direct marketing products. This should include all resource allocation needed from UNHCR, including any materials such as photos, videos, key messages, and key concepts.

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## 2.5 References

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- UNHCR Brand Book, including logo and colour usage, is available [here](#).
- UNHCR contents and materials, including photos and videos, are available for search and reference at the following links:
  - [www.unhcr.org](http://www.unhcr.org) (UNHCR's global homepage)
  - [www.unhcr.org/kr](http://www.unhcr.org/kr) (UNHCR Korea's official homepage)
  - [blog.naver.com/unhcr\\_korea](http://blog.naver.com/unhcr_korea) (UNHCR Korea's official blog)
  - [media.unhcr.org](http://media.unhcr.org) (UNHCR's global media site)

# 3 CONTENT OF YOUR PROPOSAL

Please complete Annex B (Technical Offer Form) with no page limit and submit it together with any relevant supporting documents, including design material samples, to facilitate our evaluation of your company's capacity to perform the service.

**Please DO NOT include any financial information in your technical proposal. Including information on pricing in the technical proposal may lead to disqualification.**

Your technical offer should be concisely presented and structured in the following order to include, but not necessarily be limited to, the following information.

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## 3.1 Company Qualifications

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It is considered essential for the agency to comply with the following requirements to participate in the RFP (Request for Proposal). During the technical evaluation, in this section, the panel will score the company's (1) *experience as a creative design service provider on printed materials* and (2) *experience as a creative design service provider on online/mobile materials*.

- Year founded and overall experience in the industry
- Total number of projects over the last 3 years:
  - Experience as a creative design service provider on printed materials
  - Experience as a creative design service provider on online/mobile materials
- 3 client references (client name, project description including printing & production quantity, time of project, contact information of person in charge) for successfully completed similar projects

Include any information that will facilitate our evaluation of your company's substantive reliability, financial and managerial capacity to provide the services

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## 3.2 Understanding and Capability for the Required Services

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During the technical evaluations, the panel will score the submitted 2 Design Tasks and Sample Printed Materials to evaluate the understanding and the capability to complete the required services.

**Design Task 1. Printed Material Design Task**

- Title: 2-page Newsletter designed to report on the recent emergency situations
- Task Description and objective: Design 2 pages of UNHCR Korea's 'Emergency Update' newsletter, incorporating the provided text and photos from the relevant files. The goal of the newsletter is to inform donors about the latest updates on UNHCR's response efforts and the urgent needs in the field. This newsletter will be sent to donors aged 55 and above.
- Provided materials: Korean text, photos, logos
- Size and Page #: B4 size, 2 pages
- Submission File Format: PDF file (smaller than 10MB for file upload) and the printed product

**Design Task 2. e-DM Design Task**

- Title: 3-page Mobile Card design to celebrate donor's birthday
- Task Description and objective: Design a 3-page mobile card with 2 CTA buttons connected to an external URL. The goal of the mobile card is to congratulate the donor's birthday and thank the donor on their birthday.
- Provided materials: Korean text, photos, logos, external links
- Size and Page #: mobile appropriate size, 3 pages
- Submission File Format: PDF file (smaller than 10MB for file upload). Make sure to include the link to the mobile card

**Sample Printed Materials**

- 2 samples of printed postcard pieces from past experiences and a brief description
- 2 samples of printed leaflet/pamphlet pieces from past experiences and a brief description
- 2 samples of gift packaging from past experiences and a brief description
- 2 samples of micro websites from past experiences and a brief description

**IMPORTANT for DESIGN TASK**

- The assets for the design tasks can be found in the below link.  
<https://drive.google.com/drive/folders/1maIE0yPA6RTqoQC0NGwCUhq2H7Urlonr?usp=sharing>
- Assets, including text and photos, can be selectively/partially used for the bidder's design purpose and style, but the UNHCR logo (form and colour) should be intact in its original form.
- All the files provided are only for the bidding process and should be destroyed after the completion of document submission.
- The printed product for Task 1 and Sample Printed Materials should be sent to the address below. Please make sure the samples are properly sealed in a box or an envelope before posting.  
(04631) 5F, 110, Toegye-ro, Jung-gu, Seoul, Republic of Korea, Attn: Arum Cho  
(04631) 서울특별시 중구 퇴계로 110, 5 층(회현동 3 가, 서울 N 스퀘어), 수신인: 조아름
- **Send ONLY the printed product for Task 1 and Sample Printed Materials via mail.** The technical offer and the financial offer should NOT be included. This may lead to disqualification if any other technical or financial documentation is included.

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### **3.3 Personnel Qualifications (Account Management)**

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Account management is crucial for running a successful donor retention program. This section measures the proposed customer service towards the PSP Korea team. During the technical evaluation, in this section, the panel will score the experience of the core people who will work on the UNHCR project (based on the number of years and demonstration expertise in the area):

- Please provide information on core staff who will be working on the account.
- Sufficient Account Management services to provide timely and efficient support for activities listed above.

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### **3.4 Vendor Registration Form**

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If your company is not already registered with UNHCR, you should complete, sign, and submit the Vendor Registration Form (Annex I) with your technical offer.

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### **3.5 Applicable General Conditions**

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Please indicate your acknowledgement of the UNHCR General Conditions of Contract for the Provision of Services by signing this document (Annex D) and including it in your submitted Technical Proposal.

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### **3.6 Applicable Special Data Protection Conditions**

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Please indicate your acknowledgement of the UNHCR Special Data Protection Conditions (Annex E) and include the signed copy in your submitted Technical Proposal.

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### **3.7 Financial Offer**

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Please use only Annex C (Financial Offer) to provide your corresponding fees and cost breakdown. Financial Offer must be submitted separately from the technical offer.

- Your separate Financial Offer must contain an overall offer in a single currency (KRW)
- The Financial Offer must cover all the services to be provided (price "all inclusive"). This also means that all application, license and permit-related costs are to be borne by the vendor and included in the price proposal. Please use the attachment for any necessary supporting documents to help with the financial evaluation.
- UNHCR is exempt from all direct taxes and customs duties. With this regard, the price must be exclusive of all forms of tax.
- The cost of preparing proposals and negotiating a contract, including any related travel, is not reimbursable, nor can it be included as a direct cost of the assignment.
- Please review the details of your financial offer before submission. UNHCR is not responsible for any calculation errors or mistakes.

## **4 EVALUATION**

**Only the bids passing the pre-selection criteria will be considered for technical evaluation.**

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### **4.1 Technical Evaluation**

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The technical offers will be evaluated using inter alia the following criteria and percentage distribution: 70% of the total score (on a 100-point scale, i.e. max 70 points obtainable for the technical offer). Please find the detailed scoring breakdown below. Suppliers must have a minimum technical threshold of 42 out of 70 points for the Technical Offer to be considered further in the financial evaluation process.



Please fill out Annex B as your technical response and make sure that all requested documents are attached.

<b>Company Qualifications (max 15 points)</b>	<b>Documents, information to be submitted to establish compliance with the set criteria.</b>
General market experience (max 5 points)	Scores will be allocated based on the number of years of service provided in Korea.
Experience in providing design services for printed materials (max 5 points)	The scores will be allocated for the number of design projects for printed materials currently ongoing and/or completed (over the last 3 years). UNHCR Korea may request that the companies submit relevant evidence to prove their experiences.
Experience in providing design services for online/mobile materials (max 5 points)	The scores will be allocated based on the number of design projects for online/mobile materials currently ongoing and/or completed (over the last 3 years). UNHCR Korea may request that the companies submit relevant evidence to prove their experiences.

<b>Understanding and Capability for the Required Service (max 50 points)</b>	<b>Documents, information to be submitted to establish compliance with the set criteria.</b>
Quality of the design for the printed materials (max 20 points)	<p>Please submit in your technical proposal the sample as listed under section 3.2</p> <p><b>Design Task 1. Printed Material Design Task</b></p> <p>The sample should demonstrate design ability based on the design task (concept and message, creativity, design quality, compliance with the brand guide, print quality etc.)</p>
Quality of the design for the mobile/online materials (max 20 points)	<p>Please submit in your technical proposal the sample as listed under section 3.2</p> <p><b>Design Task 2. e-DM Design Task</b></p> <p>The sample should demonstrate design ability based on the design task (concept and message, creativity, design quality, compliance with the brand guide, etc.)</p>
Similar sample products and description (max 10 points)	<p>Please submit in your technical proposal the sample as listed under section 3.2</p> <p><b>Sample Printed Materials</b></p> <p>The sample should demonstrate similar sample products and descriptions (concept and message, creativity, design quality, print quality etc.)</p>

<b>Personnel Qualifications (account management) (max 5 points)</b>	<b>Documents, information to be submitted to establish compliance with the set criteria.</b>
Experience of core people who will work on the UNHCR project. (Including experience with similar projects) (max 5 points)	The scores will be allocated based on the average years of relevant experience of the core people working on the UNHCR account. Please refer to section 3.3.

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#### 4.2 Financial Evaluation

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- The financial component is 30% of the total scores. The financial proposal is to be submitted ONLY by filling in **Annex C**. The maximum number of points (30) will be allotted to the lowest price offer. All other price offers will receive points in inverse proportion to the lowest price (e.g.,  $[\text{Total Price Component}] \times [\text{KRW lowest}] / [\text{KRW other}] = \text{Points for other Supplier's Price Component}$ ).
- The comparison will be based on UNHCR's requirements. No optional services will be included.
- Companies can quote **only in Korean Won**. For evaluation purposes only, the offers submitted in currency other than US Dollars will be converted into US Dollars using the United Nations rate of exchange in effect on the date the submissions are due.