European Food Safety Authority

TENDER SPECIFICATIONS

Reference: OC/EFSA/COM/2021/01

Subject: Framework contract for quantitative and qualitative social research methods in support of an audience-first approach & enhanced user experience in risk communication
Procurement procedure: Open call (Article 164(1) (a) of the Financial Regulation)

Project/Process code: E09.01.02 Social research and advice

Tender specifications purpose:

1. specify what EFSA will buy under the contract resulting from this procurement procedure;
2. announce the criteria which EFSA will use to identify the successful contractor;
3. guide tenderers in the preparation and sending of their offer;
4. form annex 1 of the contract resulting from this procurement procedure and be binding for contract implementation.

Additional guidance:
Please read the **EFSA Guidance for tenderers** available on the EFSA website, designed to assist potential tenderers in their understanding of EFSA procurement procedures.

Provide EFSA with feedback:
If you considered applying to this call for tenders but finally decided not to, please provide **EFSAProcurement@efsa.europa.eu** with your feedback on the call and reasons for not applying. Feedback will be treated confidentially and will only be used for improving future EFSA procurement calls.

PROCEDURE TIMETABLE

Milestone	Date[1]	Comments
Launch date	17/02/2021	Date Contract Notice is sent to Official Journal
Deadline for sending request for clarification to EFSA	13/04/2021 at 14:30 (CET)	Requests for clarification may only be submitted through the e-Tendering website as described in the Invitation Letter. EFSA is not obliged to reply to clarifications received less than 6 working days before the deadline for submission of offers.
Deadline for EFSA to reply to clarification questions	15/04/2021	
"Receipt Time Limit" - Closing date and time for receipt of offers	**21/04/2021** **at 14:30 (CET/CEST)**	Refer to the Invitation letter and part 3 of these tender specifications regarding how to submit your offer.
Virtual opening session	22/04/2021 at 14:30 (CEST)	Requests to attend the virtual opening session must be made 2 working days in advance of the opening session. Refer to Invitation letter for details.
Notification of evaluation results	Estimated MAY 2021	The outcome of the procurement procedure will be communicated to all tenderers exclusively using the e-mail address indicated in their offer. Please check regularly the inbox in question.
Contract signature	Estimated MAY 2021	

[1] All times are in the time zone of Italy, the country in which EFSA is based.

PART 1 TECHNICAL SPECIFICATIONS

1.1. BACKGROUND

The European Food Safety Authority (EFSA), as the leading EU body of this call for tenders, is responsible for food and feed risk assessment in the European Union (EU). In close collaboration with national authorities and in open consultation with its stakeholders, EFSA provides independent scientific advice and clear communication on existing and emerging risks.

EFSA has established a social science function within its Communication unit with the overall objective to provide audience insights that can inform risk communication and engagement activities with the general public, EFSA's institutional partners and other stakeholders.

Further information on social science at EFSA can be found in the document *Social science at EFSA: A roadmap for implementation*[2]. This call for tenders aims to establish a framework contract to support EFSA and other EU bodies in their various social science activities, including EU-wide surveys, data analysis, and user experience research for digital products.

The following EU bodies join this call for tenders:

EU body	Seat	Website address
European Food Safety Authority (EFSA)	Parma, Italy	https://www.efsa.europa.eu/
European Medicines Agency (EMA)	Amsterdam, Netherlands	https://www.ema.europa.eu/
European Centre for Disease Prevention and Control (ECDC)	Stockholm, Sweden	https://www.ecdc.europa.eu/
European Chemicals Agency (ECHA)	Helsinki, Finland	https://echa.europa.eu/
European Environment Agency (EEA)	Copenhagen, Denmark	http://eea.europa.eu/

1.2. OBJECTIVES AND DIVISION IN LOTS

The successful tenderers will be required to support the above EU bodies in various social research activities, including EU-wide primary and secondary data collection, data analysis, the implementation of ad-hoc surveys and digital user experience research.

[2] https://www.efsa.europa.eu/sites/default/files/event/mb190619/mb190619-i9.pdf

This tender is divided into the following 4 lots:

- Lot 1 – Primary data collection services (see section 1.2.1)
- Lot 2 – Secondary data collection and analysis services (see section 1.2.2)
- Lot 3 – Services for ad-hoc public perception measurements (see section 1.2.3)
- Lot 4 – User research & usability evaluation (see section 1.2.4)

You may submit an offer for one or more lots, but your offer should indicate clearly for which lot you are applying. In case you decide to apply for several lots, a technical and financial offer for each lot must be provided.

1.2.1. Lot 1 – Primary data collection services

The aim of this lot is to deliver primary datasets and information enabling the appointing EU body to better understand public perceptions and awareness in relation to the body's work and mandate (for example, food safety topics for EFSA).

For all tasks mentioned below, the successful tenderer will be able to:

- For each order, set up a single coordination team that coordinates the entire project, any sub-contractors, and functions as single contact point for the appointing EU body.
- Prepare a project management plan, organise meetings with stakeholders of the process, provide regular status updates to the customer, and perform other project management activities.
- Prepare a data quality assurance plan, perform and document quality assessment checks.
- Prepare summary reports in line with the corporate identity of the appointing EU body in English language.
- Cover for all services all "mandatory" countries referred to in the following table. "Mandatory" countries need to be covered to match the selection criteria in section 2.4.1. The ability to also cover "non-mandatory" countries will result in higher marks for the award criteria in section 2.6.1.

Mandatory	
Austria	Italy
Belgium	Latvia
Bulgaria	Lithuania
Croatia	Luxembourg
Cyprus	Malta

Czechia	Netherlands
Denmark	Poland
Estonia	Portugal
Finland	Romania
France	Slovakia
Germany	Slovenia
Greece	Spain
Hungary	Sweden
Ireland	Norway
Iceland	--
Non-mandatory	
United Kingdom	Switzerland
Albania	North Macedonia
Montenegro	Turkey
Serbia	Bosnia and Herzegovina
Kosovo[3]	--

<u>The successful tenderer for lot 1 will provide the following services</u>:

1.2.1.1. Surveys

The successful tenderer will implement surveys that give a representative picture of the knowledge, perceptions, and / or opinions of the target population on a certain topic. Tasks include:

- Selection of the universe: The universe will cover the general public (natural persons) aged 15 years or more, or a sub-group defined of up to 2 (two) additional socio-economic characteristics

[3] This designation is without prejudice to positions on status and is in line with UNSCR 1244 and the ICJ Opinion on the Kosovo Declaration of Independence.

(e.g. age group, gender, highest education). This shall be the standard survey universe and prices in the financial offer template (see section **Error! Reference source not found.**) must refer to this target universe. The majority of orders will require surveys of the standard survey universe. Exceptionally, the appointing EU body might request:
  - A sub-group of the general public (natural persons) defined by more than 2 (two) socio-economic characteristics.
  - Companies defined by certain characteristics (e.g. number of employees, turnover or NACE[4] sector).
- Sampling: Probability-sampling and non-probability sampling, including expert advice provided to the appointing EU body to consult on best sampling strategy.
- Ensure the representativeness of the sample..
- Stratification of the sample by country or other characteristics specified in the order.
- Master questionnaire preparation, review, cognitive testing and / or finalisation based on instructions provided by the appointing EU body.
- The number of questions per survey will be specified in the order. The standard survey size, for which the tenderer will make a financial offer, must allow for:
  - Up to 15 question units. A description of the types of questions required and the calculation of question units is provided in annex section 3.5.
  - Up to 7 demographic questions (such as the age group of the respondent) which will not contribute to the question unit quota. Additional demographic questions will count as 0.5 question units per demographic question. In case of company surveys, the demographic question units can be used for further classifying the company by defined categories.
- Initial translation of the questionnaire (provided in English language) into all other relevant languages (including the 23 other official languages of the European Union), including a second revision round of the translations to consider feedback from the appointing EU body and national experts. The successful tenderer will also accept orders where translations are already provided by the appointing EU body.
- Pilot testing, based on an agreed sub-sample of the target population, in all required languages of the survey. Subsequent revision and finalisation of the master and national questionnaires in light of the main outcomes of the pre-testing phase.
- Survey mode: Fieldwork will be conducted in one of the following modes as indicated in the order:
  - Computer-assisted personal interviewing (CAPI): The survey will be conducted face-to-face by a professional survey interviewer assisted by a mobile computer or tablet.
  - Computer-assisted telephone interview (CATI): The survey will be conducted via telephone or video conference system by a professional survey interviewer assisted by a mobile computer or tablet.

[4] NACE: Statistical Classification of Economic Activities in the European Community.

- Computer-aided web interviewing (CAWI): The respondent autonomously answers the interview online on their own device (such as computer, smartphone or tablet). There is no direct human interaction with the respondents.

- Sample sizes: Depending on the order, sample sizes per country will vary between 250 and 2,000 respondents. The successful tenderer must be able to ensure that the minimum sample size of 250 (representative of the general population aged 15 years or more, as a minimum by gender, age group, and NUTS 2[5] region) can be met in each mandatory country and each survey mode for the standard survey universe and ensure adequate response rates.
- Oversampling: The successful tenderer will be able to collect higher, disproportionate samples of certain target groups and weight these appropriately in the final results.
- Data processing, including delivery of raw data and summary data files in open source file formats as specified in the order (for example CSV).
- Summary report with summary statistics and descriptive analysis of the findings, including basic visualisations, ready for publication.

1.2.1.2. Interviews

The successful tenderer will conduct interviews with a variety of individuals drawn from consumer panels or recruited from specified target populations. Tasks include:

- Research and acquisition of relevant interview partners based on criteria specified by the appointing EU body.
- Interview guide preparation, review and / or finalisation based on instructions of the appointing EU body.
- Initial translation of the interview guide (provided in English language) into all relevant languages (including the other 23 official languages of the European Union), including a second revision round of the translations to consider feedback from the appointing EU body and national experts. The successful tenderer will also accept orders where translations are already provided by the appointing EU body.
- Interviews are held in the native language of the interviewee (limited to the 24 official languages of the European Union). The interviewer will be fluent in the local language of the interviewees.
- Mode: Depending on the order, interviews are to be performed:
  - face-to-face,
  - via telephone or online (video conference system).
- Conduct of follow-up interviews.
- Provision of interview transcriptions translated to English.
- Summary report with summary of main findings and brief analysis of the results.

[5] NUTS 2: Nomenclature of territorial units for statistics at level 2, see definition on Eurostat website: https://ec.europa.eu/eurostat/web/nuts/background

1.2.1.3. *Focus groups and social science experiments*

The successful tenderer will organise focus groups and conduct social experiments to gain an understanding of the knowledge, perceptions, and / or opinions of the target population on a certain topic. Tasks include:

- Research and acquisition of relevant focus group or experiment participants based on the requirements specified by the appointing EU body. The successful tenderer will be able to autonomously recruit participants from consumer panels or other specified target populations.
- For focus groups, discussion guide preparation, review and / or finalisation based on instructions of the appointing EU body.
- For social experiments, development of the experiment design, including research of similar studies and review of scientific literature.
- Initial translation of the discussion guide or experiment instructions (provided in English language) into all relevant languages (including the other 23 official languages of the European Union), including a second revision round of the translations to consider feedback from the appointing EU body and national experts. The successful tenderer will also accept orders where translations are already provided by the appointing EU body.
- For focus groups, provision of an experienced moderator who animates the discussion and ensures that all views within the group are equally expressed. The moderator will be fluent in the local language of the focus group participants.
- For experiments, provision of an experienced researcher who ensures conduct of the experiment under the highest scientific and ethical standards. The researcher will be fluent in the local language of the experiment participants.
- Focus groups and experiments are to be held in the native language of the participants, unless otherwise indicated.
- Focus groups and experiments may range between 2 and 12 participants.
- Mode: Depending on the order:
    - face-to-face,
    - via telephone or online (video conference system).
- All necessary infrastructure (meeting rooms, video conference system, and other infrastructure) will be provided by the successful tenderer.
- Transcription of discussion / experiment protocol translated into English.
- Summary report with summary of main findings and brief analysis of the results.

1.2.1.4. *Online surveys and interviews among small populations*

The successful tenderer will be able to conduct online surveys and interviews among small populations, as defined by the appointing EU body. These may be, for example, certain stakeholders, parliamentary groups, or similar. These will usually be conducted in English language. The list of participants will be provided by the appointing EU body. The successful tenderer will:

- Contact the participants with instructions on how to participate in the survey or interview.
- Carry out interviews and surveys:
  - Interviews via telephone or online video conferencing.
  - Surveys via an online form. If necessary, the provider will actively support participants in concluding the survey.
- Summary and / or transcription of the results.

1.2.2. Lot 2 – Secondary data collection and analysis services

The overall aim of this lot is to perform secondary data collection and analysis, enabling the appointing EU body to better understand public perceptions and awareness in relation to the body's work and mandate (for example, food safety topics for EFSA).

Details of each task (such as specific topics, coverage, scope and timeframe) will be specified via the cascade mechanism.

The successful tenderer for lot 2 will provide the following services:

1.2.2.1. Data analysis

The successful tenderer will perform statistical analysis and visualisation of data sources such as surveys and other datasets, with the aim to draw actionable conclusions that support communication strategies. Tasks include:

- Research, preparation and cleaning of data sets and other data sources, including those of national data providers within EU Member States.
- Ability to work with quantitative data (for example, statistics on food consumption).
- Ability to work with qualitative and text-based data (for example interview transcriptions).
- Recommendation and implementation of appropriate statistical analysis techniques.
- Formulation of recommendations and drawing of conclusions.
- Application of standard machine learning techniques, such as natural language processing (NLP) to analyse large data sets.
- Visualisation of results in publication-ready quality.
- Delivery of data file with all raw data and calculations used in the process of data analysis.

1.2.2.2. Discourse analysis

The successful tenderer will be able to analyse the public discourse in a variety of sources, including national media and press, parliamentary debates, social media, corporate communication channels, and other sources of discourse. Tasks include:

- Collection of required materials and information to perform discourse analysis.
- Analysis of the contents for themes and patterns.
- Preparation of summary reports with recommendations supporting the communication activities of the appointing EU body.

1.2.2.3. Secondary target audience research

The successful tenderer will perform explorative secondary research of target audiences for communication campaigns and other communication activities. Tasks include:

- Market segmentation by various demographic and socio-economic characteristics (such as age, education, income) based on new and existing secondary data collected by the contractor.
- Psychographic analysis such as information on the personality, values and opinions of the target audience in relation to the topic of the communication activity.
- Recommendations on how to align the goals of a communication activity with the needs of the target audience.
- Identification of institutional target audiences.

1.2.2.4. Literature reviews

The successful tenderer will conduct literature reviews (e.g. scoping reviews, systematic reviews) in the field of social science and risk communication based on terms of reference provided by the customer. Tasks include:

- Definition of selection and exclusion criteria.
- The provider will access the literature through their own library service or corporate subscription to conduct the literature review. Reselling of literature to the appointing EU body is not required and no full-text access needs to be provided.
- Compilation of the final literature database in BibTeX format (or similar, depending on the terms of reference), including the abstract for each item.
- Drafting of literature review reports:
    - Introduction and discussion of methodology of around 1,500 – 4,000 words
    - Summary and analysis of the reviewed literature of around 150 – 300 words per publication.
    - Summary and conclusions of around 1,500 – 4,000 words.

1.2.2.5. Other secondary data collection and desk research

The provider will conduct any other forms of secondary data collection and research. Tasks include:

- Research and identification of data sources (for example surveys conducted by national competent authorities).
- Creation, maintenance and update of databases.
- Desk research of any kind, collecting information in a format specified by the customer.

1.2.3. Lot 3 – Services for ad-hoc public perception measurements

The purpose of this lot is to create a contractual facility that allows the appointing EU body to purchase public perception insights on an ad-hoc basis under short service-level-agreements. In the case of unforeseen events, emerging topics or a shift in public debate that fall under the remit of the appointing EU body, communication experts need to understand how these topics are perceived by citizens. For this purpose, the appointing EU body wants to conduct surveys within EU countries and beyond at short notice, targeting either the EU as a whole or individual countries.

The successful tenderer ("the provider") will provide ad-hoc surveys under short service-level agreements, herein after referred to as "flash polls".

1.2.3.1. General specifications of flash polls

- Flash polls shall be carried out online without direct human interaction with the respondents. The provider guarantees that the survey system used in different countries is the same or very similar in its functionality.
- The provider will have the ability to cover all countries in country group I, II, and at least 10 countries in country group III (see country group definitions in section 1.2.3.2). The exact list of countries to be covered will be specified in the order. Offers that can also cover more countries in country group III and / or countries in country group IV will benefit from additional points in the award criteria evaluation (see section 2.6.3) but they are not a mandatory selection criterion.
- The provider will be able to translate the questionnaire delivered in English language into the other 23 official languages of the EU. However, the provider will also accept questionnaires that are already translated.
- After finalisation and translation of the questionnaire, the provider will ensure the delivery of final data within no more than 7 working days for all offered countries. Tenders that can guarantee shorter data delivery timeframes will benefit from higher scoring in the award criteria evaluation.
- Minimum sample sizes in each country group per country must be met as follows. Sample sizes shall refer to a sample representative of the general population aged 15 years or more. Tenders that can guarantee a larger sample size will benefit from higher scoring in the award criteria evaluation:

Country group	**Minimum sample size**

I	250
II	150
III	100
IV	100

- The provider is required to maintain a representative consumer panel in each country covered that can be immediately activated at any time within the contract period.
- A single flash poll shall allow for 1 – 10 question units per flash poll. The type of questions required, and the calculation of question units is defined in annex section 3.5.
- The provider will receive the questionnaire in a pre-agreed format and program the survey accordingly.
- The provider will deliver data as soon as it comes available, ideally giving live access to incoming data to the appointing EU body.
- The provider will deliver raw data in a structured format (for example CSV or Microsoft Excel file) as agreed with the EU body.
- The provider will be able to conduct repeated flash polls in which the same questionnaire is used again or in an only slightly modified version (no more than 20% of questions modified).

1.2.3.2. Country coverage

Country group I The provider must be able to cover all 4 countries.	
Germany	France
Italy	Spain
Country group II The provider must be able to cover all 6 countries.	
Poland	Romania
Netherlands	Belgium
Greece	Czechia
Country group III The provider must be able to cover at least 10 countries	
Portugal	Sweden
Hungary	Austria
Bulgaria	Denmark

Slovakia	Finland
Ireland	Croatia
Lithuania	Slovenia
Latvia	Estonia
Cyprus	Luxembourg
Malta	Norway
Iceland	--
Country group IV Coverage of these countries is not a mandatory selection criterion.	
United Kingdom	Switzerland
Albania	North Macedonia
Montenegro	Turkey
Serbia	Bosnia and Herzegovina
Kosovo[6]	--

1.2.3.3. Contractual set-up Lot 3

The EU body will send the contractor an order form indicating the annual fee (fixed payment) which guarantees that the option of flash polls can be exercised over the one-year time period of the order form, and with the number of flash polls foreseen for the year (variable payment depending on the actual execution of that option, the number of countries ordered and the sample size requested ("order fee" and "country fees")). Information on price calculations are provided in section 3.2.3.

1.2.3.4. Indicative timetable

The specific timetable will depend on the offer of the successful tenderer. To be eligible according to the selection criteria defined in section 2.4.3, the tenderer must be able to meet the following service level agreements for each phase. Days in the following table refer to working days in in the country of the EU body sending the request.

[6] This designation is without prejudice to positions on status and is in line with UNSCR 1244 and the ICJ Opinion on the Kosovo Declaration of Independence.

<table>
<tr><td colspan="2">Order phase
Each order of a flash poll must be started with the order phase, allowing the provider to understand the contents of the survey and to review the questionnaire.</td></tr>
<tr><td>Day 0</td><td>The contracting EU body orders the service by submitting to the provider no later than 18:00 C.E.T.:
• The order request with the list of countries to be covered and the required sample sizes for each country.
• The draft questionnaire in English.
• A short summary of the research project’s goals and purpose.</td></tr>
<tr><td>Day 1</td><td>Until 18:00 C.E.T. on the first working day after receiving the complete order request, the provider submits any feedback on the questionnaire, including pro-active suggestions for change, to the contracting EU body.</td></tr>
<tr><td>Day 2</td><td>The contracting EU body implements and confirms any changes and approves the final questionnaire by 18:00 C.E.T.</td></tr>
<tr><td colspan="2">Translation phase
The translation phase applies if the contracting EU body requests the translation of the questionnaire into at least one non-English language. The translation phase will not apply if: (1) The flash poll is requested only in English language, (2) the contracting EU body will do the translation work independently, (3) a repeated flash poll without modification of any questions is requested.</td></tr>
<tr><td>Day 0</td><td>The contracting EU body orders the translation of the questionnaire by submitting to the provider no later than 18:00 C.E.T.:
• The approved final questionnaire in English.
• The list of languages for which a translation is requested.
Note: Day 0 of the translation phase can be equivalent to day 2 of the order phase.</td></tr>
<tr><td>Day 1</td><td>The provider performs the translation.</td></tr>
<tr><td>Day 2</td><td>The provider performs the translation.</td></tr>
<tr><td>Day 3</td><td>The provider finalises the translation and submits the translated questionnaires to the contracting EU body by 14:00 C.E.T.</td></tr>
<tr><td colspan="2">Fieldwork phase
In the fieldwork phase, the provider will carry out the survey in all requested countries. The minimum acceptable timeframe for the delivery of data after the fieldwork phase has been initiated will be 7 working days, preference will be given to tenderers with shorter delivery times (see award criteria section 2.6.3).</td></tr>
<tr><td>Day 0</td><td>The contracting EU body requests the launch of fieldwork by the submitting to the provider by 18:00 C.E.T.:
• The final questionnaire in all required languages.
• The list of countries and sample sizes as agreed in the order phase.</td></tr>
</table>

	• The required deadlines for data delivery, which must be in line with the data delivery timeframes offered by the provider. Note: Day 0 of the fieldwork phase can be equivalent to day 2 of the order phase or day 3 of the translation phase.
Day 0 + n	On day n, the provider delivers final data. Day n is the number of working days offered for data delivery and may vary by country.

1.2.3.5. Service level agreements and penalties

In line with the indicative timetable defined in section 1.2.3.4, the successful tenderer will comply with the following service level agreements (SLAs):

SLA	**Definition**	**Example**
SLA 1	Order phase: After receiving an order by 18:00 C.E.T., the provider will review the draft questionnaire and add any suggestions for change by 18:00 C.E.T. on the first working day after receiving the request.	• EU body sends order on Monday, 11 January, 18:00 C.E.T. • Provider responds with reviewed questionnaire no later than Tuesday, 12 January, 18:00 C.E.T.
SLA 2	Translation phase: After receiving a request for translation by 18:00 C.E.T., the provider will translate the English questionnaire into all requested languages by the 3rd business day on 14:00 C.E.T. after receiving the request.	• EU body requests translation on Monday, 18 January, 18:00 C.E.T. • Provider responds with translated questionnaires no later than Thursday, 21 January, 14:00 C.E.T.
SLA 3	Fieldwork phase: The provider must be able to deliver data within the timeframe and according to indicated maximum sample sizes indicated in their offer.	• Successful tenderer offers data delivery for all countries within 7 working days • EU body requests fieldwork on Monday, 18 January, 18:00 C.E.T. • Provider delivers data at correct sample size no later than Wednesday, 27 January, 18:00 C.E.T. (two

		non-working days on the weekend included).

The successful tenderer must be able to deliver data within the timeframe and according to indicated maximum sample sizes indicated in their offer. If within the agreed timeframe the ordered sample size is not met, the appointing EU body reserves the right to impose the following penalties for the delay or incompleteness of data.

Penalty 1 in relation to SLA 1

Per 24 hours of delay after the deadline of the first working day at 18:00 C.E.T., the penalty will be 20% of the order fee.

Calculation
$F \times n \times 0.2$
F = Order fee n = Number of working days delayed, measured in 24-hour steps
The maximum penalty applicable to SLA 1 shall not exceed 100% of the order fee.

Example: The agreed order fee is € 1,500.00 and the provider replies with the reviewed questionnaire with a delay of 48 hours (two working days). The penalty will be calculated as follows:

$$1500 \times 2 \times 0.2$$

The total penalty in relation to SLA 1 is therefore € 600.00.

Penalty 2 in relation to SLA 2

Per 24 hours of delay after the deadline of the 3rd business day at 14:00 C.E.T., the penalty will be 20% of the translation fee applicable to the questionnaires that are delayed.

Calculation
$C \times n \times 0.2$
C = Total cost of the translation for language which is delayed n = Number of working days delayed, measured in 24-hour steps

The maximum penalty applicable to SLA 2 shall not exceed 100% of the order fee.

Example: The successful tenderer offers translation into Bulgarian, Croatian and Czech at the following rates. The contracting EU body requests the translation of a questionnaire with 1,000 words.

Language	Cost per 100 words	Total cost
Bulgarian	€ 28.00	€ 280.00
Croatian	€ 30.00	€ 300.00
Czech	€ 32.00	€ 320.00

Contrary to the definitions of SLA 2, the provider does not deliver all questionnaires on the 3rd business day (after requesting the translations) on 14:00 C.E.T., but instead:

- Delivers the Bulgarian translation on the 3rd business day at 18:00 C.E.T.
- Delivers the Croatian translation on the 4th business day at 10:00 C.E.T.
- Delivers the Czech translation on the 4th business day at 18:00 C.E.T.

Accordingly, the following penalties apply:

Translation	Calculation	Final penalty
Bulgarian	Since delivery took place at 18:00 instead of 14:00, one day delay applies: $280 \times 1 \times 0.2$	€ 56.00
Croatian	Since delivery took place within 24 hours after the deadline, one day delay applies: $300 \times 1 \times 0.2$	€ 60.00
Czech	Since delivery took place within 48 hours after the deadline, two days delay apply: $320 \times 2 \times 0.2$	€ 128.00
Total penalty in relation to SLA 2:		**€ 244.00**

Penalty 3 in relation to SLA 3

No.	Penalty	Calculation
3a	Delay of 1 working day	$C \times 10\% \times \frac{S_O - S_D}{S_O}$
3b	Delay of 2 working days	Penalty 3a + $C \times 10\% \times \frac{S_O - S_D}{S_O}$
3c	Delay of 3 working days	Penalty 3b + $C \times 10\% \times \frac{S_O - S_D}{S_O}$
3d	Delay of more than 3 working days	Penalty 3c + $C \times 20\% \times \frac{S_O - S_D}{S_O}$ A delay of more than 3 working days will be treated as non-delivery of the data.
C = Country fee of the country where the penalty applies S_O = Sample size ordered S_D = Sample size delivered		
The maximum penalty is 50% of the sum of order fee + all individual country fees.		

Example: The successful tenderer offers data delivery for Germany, Italy, France and Spain under the following conditions:

Country	Data delivery	Maximum sample size	Cost per 100 respondents
Germany	3 working days	350	€2,000
Italy	4 working days	300	€1,800
France	6 working days	300	€2,500
Spain	7 working days	250	€1,500

Within the contracting period, the EU body requests a flash poll in all the four countries with a sample size of 250 in each country. Consequently, the cost in each country is:

Country	Ordered sample size	Total country fee
Germany	250	€5,000
Italy	250	€4,500
France	250	€6,250
Spain	250	€3,750

However, contrary to the offer, the tenderer delivers:

	Data delivered (no. of respondents)			
On working day	**Germany**	**Italy**	**France**	**Spain**
1 – 3	0 *	0	0	0
4	0	200 *	0	0
5	250	0	0	0
6	0	0	200 *	0
7	0	0	50	250 *
* Expected day of data delivery according to contract				

That is:

- For Germany, there is a delay of 2 working days (delivered on working day 5 instead of working day 3). Therefore, penalty 3b will be applied.
- For Italy, the sample size is not complete (200 instead of 250). Penalty 3d applies apply and the missing 50 respondents are treated as not delivered.
- For France, 200 responses are delivered on time and 50 with delay of 1 working day. Penalty 3a applies.
- For Spain, the delivery is on time and complete. No penalty imposed.

Therefore, penalties will be imposed for delays in Germany, Italy and France as follows:

Country	**Calculation**	**Final penalty**
Germany	$5000 \times 10\% \times \frac{250-0}{250} + 5000 \times 10\% \times \frac{250-0}{250}$	€1,000
Italy	$4500 \times 10\% \times \frac{250-200}{250} + 4500 \times 10\% \times \frac{250-200}{250} + 4500 \times 10\% \times \frac{250-200}{250} + 4500 \times 20\% \times \frac{250-200}{250}$	€450
France	$6250 \times 10\% \times \frac{250-200}{250}$	€125
Total penalty:		**€1,575**

1.2.4. Lot 4 – User research & usability evaluation

The successful tenderer will support the appointing EU body in evaluating and improving the performances of its digital products from a user experience viewpoint. The portfolio of digital products that is maintained by EFSA and other EU bodies is changing and extending on an ongoing basis and includes, besides their corporate websites, other web platforms, microsites and campaign websites for various types of target audiences. The roadmap of these products, as well as the specific design decisions, has to be driven by the analysis of the needs of their target users.

<u>The successful tenderer for lot 4 will provide the following services</u>:

1.2.4.1. User research planning

The successful tenderer will support the appointing EU body in planning user research. Based on an analysis of the as-is situation and the specific brief provided by the appointing body, the successful tenderer will develop user research and test plans in order to identify the right mix of methods, tools and resources needed for each specific initiative.

Deliverables include, but are not limited to:

- Definition of research goals and objectives
- Definition of approach blueprint and roadmap
- Definition of research channels and tactics
- Detailed planning of activities and resources

The outputs of this activity also serve as starting point for the implementation of the following services.

1.2.4.2. *Users research implementation*

The successful tenderer will support the appointing EU body in implementing user research.

- Define and implement a variety of qualitative and quantitative user research methods, to understand users' needs, analyse their feedback, their level of satisfaction, and prioritise recommended improvements to support shaping products' roadmap and their design.
- Support service and product managers by generating useful insights; work closely with designers and analysts to iteratively improve services.
- Depending on the specific project and/or its phase, identify and implement the most appropriate mix of tools and user research methods, including but not limited to:
    - Field study and user interviews, ensuring representativeness of the sample with respect to pre-identified demographic characteristics
    - Survey and continuous user feedback methods
    - Journey mapping
    - Search-log analysis

- Persona building
- User stories
- Task analysis
- Card sorting

1.2.4.3. Usability evaluation

- Apply a variety of qualitative and quantitative evaluation_methods to understand users' interaction with digital products, identify opportunities for improving their usability, and ultimately to improve user experience and performances.
- Support product managers by generating implementable recommendations; work closely with designers, analysts and developers to iteratively improve products.
- Depending on the specific project and/or its phase, identify and implement the most appropriate mix of tools and methods, including but not limited to:
    - Field study and user interviews, ensuring representativeness of the sample with respect to pre-identified demographic characteristics
    - Survey and continuous user feedback methods
    - Expert usability review
    - Qualitative usability testing (in-person or remote), with use of eye-tracking software if relevant
    - Analytics review
    - Search-log analysis
    - Prototype feedback & testing
    - Tree testing
    - A/B testing

1.2.4.4. Support the development of an internal user research practice

The successful tenderer will support the appointing EU body in the development of an internal user research practice in support of a more user-centric product development approach.

Included in this service and related to the services under the scope of this lot (user research, usability evaluation):

- Definition of an operational framework to effectively capture users' insights and convert them into actionable items, in support of products and services development.
- Definition of a mid/long-term roadmap for the implementation of the target framework.
- Mapping internal resources against future needs, including the development of a competence development plan.

1.3. INFORMATION ON THE CONTRACT

Language

The working language for contract implementation including execution of tasks, meetings and deliverables shall be English. Any written deliverables must be to a high standard of English which does not require proof reading.

Nature of expense services

Type of contract framework (FWC)

Type of FWC

- Lot 1: Multiple framework contract with reopening competition
- Lot 2: Multiple framework contract in cascade
- Lot 3: Multiple framework contract in cascade
- Lot 4: Multiple framework contract in cascade

Maximum number of contractors in each lot:

- Lot 1: Maximum of 5 contractors
- Lot 2: Maximum of 3 contractors
- Lot 3: Maximum of 3 contractors
- Lot 4: Maximum of 3 contractors

Place of performance

As a general rule, the contractor's team will work remotely. Some members of the team may have to work on the appointing EU body's premises if stipulated in the order forms/specific contracts.

Travel costs will be reimbursed according to the following flat fees:

Type of transport	Distance in road Km	Travel Unit cost
Car, Train	Any distance	0.22 €/Km

Flight	[300 – 600]	400 €
Flight	[600 – 1.200]	450 €
Flight	> 1.200	500 €

The distance is calculated in road km using google maps.

If the travel is by car or train the distance is calculated per return journey multiplying the number of km x 2. If two or more consultants travel together sharing a car, the cost should be calculated only one time for the entire group of people.

Accommodation and subsistence allowances will be reimbursed according to latest updated EC per diem rates depending on the country where the contractor is traveling.

The EC per diem rates can be found clicking on the below link:

https://ec.europa.eu/international-partnerships/system/files/per-diem-rates-20200201_en.pdf

One per diem will be reimbursed per day of presence in the EU Body premises.

Duration of FWC

One year + automatic renewal up to 3 times for an overall maximum duration of four consecutive years.

Budget information

Total value of call: 3.740,000.00 €.

The financial ceilings available for specific contracts / order forms for each lot under the framework contract are:

Lot 1) EUR 1,600,000.00

Lot 2) EUR 680,000.00

Lot 3) EUR 500,000.00

Lot 4) EUR 960,000.00

Not all the participating EU bodies will be able to use all the services. This is because some bodies have already ongoing FWC covering some of the above services that will not expire before the planned entry into force of the FWC resulting from this call for tenders. This table below clarifies for each EU body which services it will be able to order. The values indicated are estimated amounts. Shift of amounts between agencies are foreseen and will be coordinated by EFSA:

EU Agency	Country	Estimated envelope for 4 years (in EUR) LOT 1	Estimated envelope for 4 years (in EUR) LOT 2	Estimated envelope for 4 years (in EUR) LOT 3	Estimated envelope for 4 years (in EUR) LOT 4
European Food Safety Authority (EFSA)	ITALY	€ 1,320,000	€ 400,000	€ 400,000	€ 500,000
European Medicines Agency (EMA)	NETHERLANDS	€ 100,000	€ 100,000	€ 100,000	€ 100,000
European Centre for Disease Prevention and Control (ECDC)	SWEDEN	€ 120,000	€ 120,000	€ -	€ -
European Chemicals Agency (ECHA)	FINLAND	€ 60,000	€ 60,000	€ -	€ 60,000
European Environment Agency (EEA)	DENMARK	€ -	€ -	€ -	€ 300,000

Possible increase of FWC envelope

In accordance with Annex I, Section 2, article 11.1 e) of the Financial Regulation, EFSA reserves the right to launch a future negotiated procedure with the contractor chosen as a result of this call for tender, for new services consisting in the repetition of similar services during the three years following the signature of the original framework contract. The increase will not go beyond 50% of the original envelope of 3.740,000.00 €.

Price indexation

The mechanism for the indexation of prices is set out in the draft framework contract.

Framework contract implementation modalities

The framework contract will be implemented using order forms/specific contracts.

While the EU body will try to define in full the specific assignment for reopening competition or cascade, including all possible subsequent phases, in case there will be need of a follow up consultancy service on the same subject, not covered by the specific contract resulting from the reopening competition or cascade, for the reason of methodology continuity and overall efficiency, such follow up specific contract will be deemed to be part of the specific assignment and assigned directly to the winner of the reopening competition in subject or the contractor who get the previous assignment via the cascade mechanism. Sum of follow up specific contracts assigned in this direct way shall not exceed 100% of the value of the initial assignment, unless otherwise specified and duly justified by the EU body in the initial request for service.

1.3.1. ORDER FORMS/SPECIFIC CONTRACS – ORDERING PROCESS

A) TIME & MEANS IN REOPENING COMPETITION MODE – ORDERING PROCESS FOR LOT 1

1. EU body sends via email to all framework contractors a request for offer indicating the following:
    - the character of activities or services to be provided,
    - the requested profiles,
    - the number of required person-days per profile,
    - the start date and the duration of the assignment
    - Award criteria to be used to select the winner of reopening competition: the price is the only award criteria to be used.

2. The contractor must present an offer via email as follows:
    - The contactor is kindly requested to inform EU body in 3 working days since the request for service has been submitted if they consider competing in the ongoing reopening competition. This is purely for informative purposes; the deadline for presenting the offer remains the same in any case for all invited contractors.
    - The contractor must propose to EU body, in maximum 5 working days since the request for service has been submitted (longer periods are possible for more complex assignments), for each requested profile the best possible candidates.
    - The proposed consultants must be available at the start of the assignment and throughout its duration. Europass Curriculum Vitae (CV) forms should be used preferably.
    - The proposed consultants must meet the profile requirements specified in these tender specifications.
    - The proposed consultants must be available, upon EU body's request, for tele/videoconference interviews with 2 working day notice. The objective of the interviews is to assess the technical competences of the consultant against the requirements of EU body's request.
    - EU body may contact the previous clients declared in consultant`s CV to verify the consultant`s abilities.
    - The contractor's financial offer must be based on the unit prices per profile agreed in the framework contract or on lower prices.

3. The EU body will evaluate the received offers and rank them based on the preannounced award criteria. When evaluating the offers, EU body takes into account any conflicting interests which may negatively affect the performance of the specific contract (see Article II.7 of the FWC).

4. The EU body will sign a TM order form/specific contract with the winner of the reopened competition.

B) FIXED PRICE IN REOPENING COMPETITION MODE – ORDERING PROCESS FOR LOT 1

1. EU body sends via email to all framework contractors a request for offer indicating the following:

- Objective of the project
- The <u>exact</u> deliverables and their timing
- Clear and detailed description of the expected quality of the deliverable, where possible indicating KPI / quality indicators
- Maximum available budget
- Number and timing of meetings
- The start date
- Milestones and duration
- Possibly: minimum profile levels requested, and minimum workload involvement for each profile
- Other minimum requirements, e.g. for the method to be used
- Foreseen interdependences
- Major risks or issues
- Payment/invoicing rules

2. The contractor presents an offer via email according to this process:

- The contactor is kindly requested to inform EU body in 5 working days since the request for service has been submitted if they consider competing in the ongoing reopening competition. This is purely for informative purposes, the deadline for presenting the offer remains the same in any case for all invited contractors.
- The contractor shall present in 10 working days since the request for service has been submitted (longer periods are possible for more complex assignments) an offer meeting the above requirements (point 1 above).
- The contractor's technical offer must include a work organisation plan, proposed team (proposed profiles and the names), task distribution among the team, deliverables, constraints, activities, work packages etc. Europass Curriculum Vitae (CV) forms should be used preferably.
- The contractor must propose to EU body for each requested profile the best possible candidates.
- The proposed consultants must be available at the start of the assignment and throughout its duration. Europass Curriculum Vitae (CV) forms should be used preferably.
- The proposed consultants must meet the profile requirements specified in these tender specifications.
- The proposed consultants must be available, upon EU body's request, for tele/videoconference interviews with 2 working day notice. The objective of the interviews is to assess the technical competences of the consultant against the requirements of EU body's request.
- EU body may contact the previous clients declared in consultant`s CV to verify the consultant`s abilities.
- In its offer the contractor should indicate if any subcontracting is foreseen.

- The contractor’s financial offer must be based on the unit prices per profile agreed in the framework contract or on lower prices.

3. The EU body will evaluate the received offers and rank them based on the award criteria. When evaluating the offers, the EU body takes into account any conflicting interests which may negatively affect the performance of the specific contract (see Article II.7 of the FWC).

4. The EU body will sign a fixed price specific contract with the winner of the reopened competition.

C) TIME & MEANS IN CASCADE MODE – ORDERING PROCESS FOR LOT 2 & 4

Typically used for ad-hoc consultancy. The framework contractor best ranked following this call for tenders will be contacted first with a request for service.

Time & means orders are in general executed on EU body premises (intramuros) but, upon EU body request, can also be executed on contractor’s premises (extramuros).

1. EU body places via email the request for services indicating the following:
   - the character of activities or services to be provided,
   - the requested profiles,
   - the number of required person-days per profile,
   - the start date and the duration of the assignment

Attention: The EU body reserves the right to discuss with the contractor the service need before the contractor places the offer.

2. The contractor must present an offer via email as follows:
   - The contactor must confirm to EU body in maximum 3 working days since the request for service has been submitted if they will submit an offer or not. Absence of response or a negative response will activate the cascade.
   - The contractor must propose to EU body, in maximum 5 working days since the request for service has been submitted (longer periods are possible for more complex assignments), for each requested profile the best possible candidates.
   - The proposed consultants must be available at the start of the assignment and throughout its duration. Europass Curriculum Vitae (CV) forms should be used preferably.
   - The proposed consultants must meet the profile requirements specified in these tender specifications.
   - The proposed consultants must be available, upon EU body’s request, for tele/videoconference interviews with 2 working day notice. The objective of the interviews is to assess the technical competences of the consultant against the requirements of EU body’s request.
   - EU body may contact the previous clients declared in consultant`s CV to verify the consultant`s abilities.
   - The contractor’s financial offer must be based on the unit prices per profile agreed in the framework contract.

3. In case of unavailability of the first contractor, e.g. having failed the deadlines, or having proposed

unsuitable consultants, the second-best ranked framework contractor will be approached and so on.

The cascade process will terminate either with the award of the assignment in question to one of the contractors, or with the failure to award the assignment to any contractor. In the event of failure, the EU body will withdraw the request, or redefine the assignment and start the procedure based on a new request with the first priority contractor.

When running the cascade mechanism, the EU body considers any conflicting interests which may negatively affect the performance of the specific contract (see Article II.7 of the FWC) in which case the contractor with such a conflict will be by-passed.

4. Once the EU body agreed to the offer of the contractor the TM order form/specific contract will be signed.

D) FIXED PRICE IN CASCADE MODE – ORDERING PROCESS FOR LOT 2 & 4

Fixed price assignments are mainly executed outside EU body's premises (extramuros) but upon EU body request could also be executed at EU body premises (intramuros).

1. EU body sends via email to the first framework contractor a request for service indicating at least:
    - Objective of the project
    - The exact deliverables and their timing
    - Maximum available budget
    - Clear and detailed description of the expected quality of the deliverable, where possible indicating KPI / quality indicators
    - Number and timing of meetings
    - The start date
    - Milestones and duration
    - Possibly: minimum profile levels requested, and minimum workload involvement for each profile
    - Other minimum requirements, e.g. for the method to be used
    - Foreseen interdependences
    - Major risks or issues
    - Payment/invoicing rules

Attention: The EU body reserves the right to discuss with the first contractor the service need before the contractor places the offer.

2. The contractor must present an offer via email as follows:
    - The contactor must confirm to EU body in maximum 3 working days since the request for service has been submitted if they will submit an offer or not. Absence of response or a negative response will activate the cascade.
    - The contractor shall present in 10 working days since the request for service has been submitted (longer periods are possible for more complex assignments) an offer meeting the above requirements (point 1 above).
    - The contractor's technical offer must include a work organisation plan, proposed team (proposed profiles and the names), task distribution among the team, deliverables,

constraints, activities, work packages etc.

- The contractor must propose to EU body for each requested profile the best possible candidates.
- The proposed consultants must be available at the start of the assignment and throughout its duration. Europass Curriculum Vitae (CV) forms should be used preferably.
- The proposed consultants must meet the profile requirements specified in these tender specifications.
- The proposed consultants must be available, upon EU body's request, for tele/videoconference interviews with 2 working day notice. The objective of the interviews is to assess the technical competences of the consultant against the requirements of EU body's request.
- EU body may contact the previous clients declared in consultant`s CV to verify the consultant`s abilities.
- In its offer the contractor should indicate if any subcontracting is foreseen.
- The contractor's financial offer must be based on the unit prices per profile agreed in the framework contract.

The EU body reserves the right to discuss the submitted offer with the contractor in order to fine-tune it. As a result of such meeting, the contractor shall send the updated offer within 5 working days. The contractor should not change the resources proposed in the draft offer.

3. In case of unavailability of the first contractor, e.g. having failed any deadlines in the above process, or having proposed unsuitable consultants, the second-best ranked framework contractor will be approached and so on.

During the cascade mechanism the request specification will not change (e.g. profiles and/or technical annexes and deliverables must remain the same). In simple words, the second, third contractor, etc., shall be all faced with the same request when it comes down to them via the cascade. However, sometimes EU body has fixed milestones, e.g. there might be a fixed end date for the assignment because there is a legislative or other externally imposed deadline by which EU body needs to have the specific contract output. This inevitably means that for the contractors later in the cascade, as the cascade is run and takes time, there is less and less time to carry out the work. Example: first in cascade is approached on 1 June with a service request where the output is to be delivered by 1st November the same year. The first contractor in cascade is unavailable and accordingly on 1 July the second contractor in cascade is requested to provide the output by 1st November. Such shorter time might require more intensive involvement of consultants to still arrive to 1st November deadline.

The cascade process will terminate either with the award of the assignment in question to one of the contractors, or with the failure to award the assignment to any contractor. In the event of failure the EU body will withdraw the request, or redefine the assignment and start the procedure based on a new request with the first priority contractor.

When running the cascade mechanism, the EU body considers any conflicting interests which may negatively affect the performance of the specific contract (see Article II.7 of the FWC) in which case the contractor with such a conflict will be by-passed.

4. Once the EU body agreed to the offer of the contractor the fixed price order form/specific contract

will be signed.

E) ORDERING PROCESS FOR LOT 3

Annual order for fixed number of polls

The annual order shall depend on the maximum number of individual polls per country that can be exercised of the period of one year.

- Up to 90 polls
- Up to 180 polls
- Up to 270 polls

The fixed annual fee, which depends on this maximum number, will be paid upon signature of the order form. This fee includes all costs that incur to the contractor for maintaining consumer panels, maintaining business relationships with their sub-contractors and similar expenses. No reimbursement to the contracting authority of this fee is envisaged in case the number of polls ordered in a year is lower than expected.

A variable fee will be paid upon conclusion of a poll. The variable fee consists of:

- The "order fee", for ordering one survey to be conducted in either one or many countries;
- The "country fees", for carrying out the survey in one or many countries;
- Optionally, the "translation fee", for translating the survey questionnaire.

The contracting authority is advised to draw up a provisional commitment to cover the expenses of the annual order and the fixed fee, order fee, country fee and translation fee.

Order phase[7] Each order of a flash poll must be started with the order phase, allowing the provider to understand the contents of the survey and to review the questionnaire.	
Day 0	The contracting EU body orders the service by submitting to the provider no later than 18:00 C.E.T.: • The order request with the list of countries to be covered and the required sample sizes for each country. • The draft questionnaire in English.

[7] The specific timetable will depend on the offer of the successful tenderer. Days in the following table refer to working days in in the country of the EU body sending the request.

	• A short summary of the research project's goals and purpose.
Day 1	Until 18:00 C.E.T. on the first working day after receiving the complete order request, the provider submits any feedback on the questionnaire, including pro-active suggestions for change, to the contracting EU body.
Day 2	The contracting EU body implements and confirms any changes and approves the final questionnaire by 18:00 C.E.T.
Translation phase The translation phase applies if the contracting EU body requests the translation of the questionnaire into at least one non-English language. The translation phase will not apply if: (1) The flash poll is requested only in English language, (2) The contracting EU body will do the translation work independently, (3) A repeated flash poll without modification of any questions is requested.	
Day 0	The contracting EU body orders the translation of the questionnaire by submitting to the provider no later than 18:00 C.E.T.: • The approved final questionnaire in English. • The list of languages for which a translation is requested. Note: Day 0 of the translation phase can be equivalent to day 2 of the order phase.
Day 1	The provider performs the translation.
Day 2	The provider performs the translation.
Day 3	The provider finalises the translation and submits the translated questionnaires to the contracting EU body by 14:00 C.E.T.
Fieldwork phase In the fieldwork phase, the provider will carry out the survey in all requested countries. The minimum acceptable timeframe for the delivery of data after the fieldwork phase has been initiated will be 7 working days, preference will be given to tenderers with shorter delivery times (see award criteria section 2.6.3).	
Day 0	The contracting EU body requests the launch of fieldwork by the submitting to the provider by 18:00 C.E.T.: • The final questionnaire in all required languages. • The list of countries and sample sizes as agreed in the order phase. • The required deadlines for data delivery, which must be in line with the data delivery timeframes offered by the provider. Note: Day 0 of the fieldwork phase can be equivalent to day 2 of the order phase or day 3 of the translation phase.
Day 0 + n	On day n, the provider delivers final data. Day n is the number of working days offered for data delivery and an vary by country.

In case of unavailability of the first contractor to sign an annual order form for this service, the second-best ranked framework contractor will be approached and so on.

1.3.2. ORDER FORMS/SPECIFIC CONTRACTS – IMPLEMENTATION

VALID FOR ANY ORDER FORMS/SPECIFIC CONTRACTS:

Signing the order forms/specific contracts:

Normally the EU body signs the order form/specific contract as a first party, however some EU bodies might require the opposite order.

Some EU bodies will carry out the signature of the order form/specific contract electronically.

The contractor shall dispatch to the EU body the order form/specific contract signed by their responsible legal representative within a maximum of 2 working days of receipt of the contract from EU body.

Implementing order forms/specific contracts – quality and continuity of service:

The contractor must ensure the continuity of service necessary for performance of the order form/specific contract. Under no circumstances shall the contractor invoke a change in personnel to justify a failure to comply with contractual obligations, in particular compliance with deadlines and quality requirements.

For time and means order forms/specific contracts the contractor personnel must record the hours worked in a way agreed with the EU body. Such declared hours worked will be subject to EU body approval (by the responsible project officer). Time spent by consultants travelling to and from meetings related to the contract implementation will not be recognised as a chargeable time.

Measuring quality of performance:

The EU body shall monitor execution of the contract at the agreed milestones, such as interim / final deliverables and meetings. The contractor must report to EU body any problems in contract implementation, even outside the agreed milestones. Not having reported such issues will impact EU body decision regarding the eventual price decrease in proportion to the failure to deliver. In any case, if the contractor didn't meet the expectations the EU body will invoke the decrease of the price in proportion to the failure to deliver the expected services, in line with the procedure foreseen in the framework contract as follows:

II.16 REDUCTION IN PRICE

II.16.1 Quality standards

If the contractor fails to provide the service in accordance with the FWC or a specific contract ('unperformed obligations') or if it fails to provide the service in accordance with the expected quality levels specified in the tender specifications ('low quality delivery'), the EU body may reduce or recover payments proportionally to the seriousness of the unperformed obligations or low quality delivery. This *includes in particular cases where the EU body cannot approve a Result, report or deliverable as defined in Article I.6 after the contractor has submitted the required additional information, correction or new version.*

A reduction in price may be imposed together with liquidated damages under the conditions of Article II.15.

II.16.2 Procedure

The EU body must formally notify the contractor of its intention to reduce payment and the corresponding calculated amount.

The contractor has 30 days following the date of receipt to submit observations. Failing that, the decision becomes enforceable the day after the time limit for submitting observations has elapsed.

If the contractor submits observations, the EU body, taking into account the relevant observations, must notify the contractor:

(a) of the withdrawal of its intention to reduce payment; or

(b) of its final decision to reduce payment and the corresponding amount,

Measuring on-time-ness:

1. The deliverables must be submitted on time and be fully compliant to the specifications described in the specific contract.
2. Tenderers are hereby reminded on the framework contract provisions related to the application of liquidated damages in the cases of delayed submission of deliverables: refer to article II.15 of the draft FWC.
3. If the contractor submits a deliverable in a poor quality to comply with the agreed deadline it will not be recognised as a valid deliverable submission, accordingly the delay will start running.

Payments of Lot 1, Lot 2 and Lot 4:

Pre-financing: not applicable

<u>Time and Means mode:</u>

The contractor shall submit an invoice for a monthly/bi-monthly/quarterly or balance payment according to the payment modalities indicated in the order form/specific contract.

Requests for monthly/bi-monthly/quarterly or balance payment shall be accompanied by:

- the relevant invoice indicating the reference number of the order form/specific contract to

which they refer;
- the timesheets duly approved and signed by the Project Officer of the Contracting Authority responsible for that particular Specific Contract;
- a list of all pre-existing rights incorporated into the results or parts of the results for interim deliverables or a declaration stating that there are no such pre-existing rights, as provided for in Article II.13.4 of the Framework Contract

The invoicing is based on the number of days delivered. The minimum unit chargeable to EU body is a half day corresponding to 4 hours. Where an excess of 8 hours has been worked, no additional charge may be made to EU body neither for working at weekends (unless exceptionally authorised). If services worked on a day are between 4 and 8 hours, half a day may be charged.

EU bodies shall make the payment within 60 days from receipt of the invoice.

Fixed price mode:

Interim payment

Interim payment is admissible only if both the overall value of the order form/specific contract is ≥ EUR 60.000 and the duration is ≥ 6 months.

The percentage of the interim payment(s) shall be agreed between EU bodies and the contractor based on the deliverable(s) as defined in the order form/specific contract.

Requests for interim payment shall be accompanied by:

- the relevant invoice indicating the reference number of the order form/specific contract to which they refer;
- a progress/interim report or interim deliverable or any other document in accordance with the relevant order form or specific contract;
- a list of all pre-existing rights incorporated into the results or parts of the results for interim deliverables or a declaration stating that there are no such pre-existing rights, as provided for in Article II.13.4 of the Framework Contract

Payment of the balance

Request for payment of the balance shall be accompanied by:

- the relevant invoice indicating the reference number of the order form/specific contract to which they refer;
- a final report or final deliverable or any other document in accordance with the relevant order form /specific contract
- a list of all pre-existing rights incorporated into the results or parts of the results for interim deliverables or a declaration stating that there are no such pre-existing rights, as provided for in Article II.13.4 of the Framework Contract

In case of low quality of the deliverable(s) and/or no respect of the legal deadline(s) the deliverable(s) shall be accompanied by a note to the file signed by the responsible Project Officer assessing the quality of the service provided in accordance of Article II.16.1 of the FWC related to the quality standards.

EU bodies shall make the payment within 60 days from receipt of the invoice.

For this particular call for tenders, the possibility to include new prices in the FWC for implementation is foreseen. In such case, EFSA will be ultimately responsible for the acceptance of the new prices proposed and reserves the right to check alignment of the proposed price to market prices. Such check may include market research, including obtaining quotes from other market operators in order to verify the price proposed aligns with those obtainable on the open market.

Payments of Lot 3:

Annual fee (fixed payment) which guarantees that the option of flash polls can be exercised over the one-year time period of the order form. EU bodies shall make the payment within 30 days from the signature of the order form.

Variable payment depending on the actual execution of that option, the number of countries ordered and the sample size requested ("order fee", "country fees" and optionally "translation fees"). Information on price calculations are provided in section 3.2.3. EU bodies shall make the payment within 60 days from receipt of the invoice for a specific poll.

1.4. OWNERSHIP, INTELLECTUAL PROPERTY RIGHTS, USE OF RESULTS

As regards any product or delivery commissioned by EFSA and developed by the contractor in the context of the contract resulting from this call for tenders, as well as source codes of IT applications and models developed for EFSA, the intellectual property rights will be owned by EFSA only in its capacity as financial source of the contract. The contractor cannot file a trademark, patent, copyright or other IPR protection scheme in relation to any of the results or rights obtained by EFSA in performance of the contract, unless the contractor requests EFSA ex-ante authorisation and obtains from EFSA a written consent in this regard.

In addition, the contractor selected as a result of the present procurement procedure shall be solely responsible and liable for the following:

- To ensure that terms and conditions asserted by any copyright holder of publications or information referred to in the final deliverable for EFSA are fully satisfied;
- To make the necessary arrangements enabling EFSA to reproduce and make non-commercial use of publications and information referred to in the final deliverable it commissioned. As

needed, the contractor shall consult with copyright licensing authorities (i.e. at national level) for guidance on purchasing copyright licenses to reproduce any publications provided to EFSA. The contractor remains solely responsible and liable for obtaining all necessary authorizations and rights to use, reproduce and share the publications provided to EFSA

In the specific case of literature reviews, should the entirety or partial texts covered by pre-existing rights be used in the final deliverables for EFSA the "Contractor shall consult with copyright licensing authorities (i.e. at national level) for guidance on purchasing copyright licenses to reproduce any publications provided to EFSA. The contractor remains solely responsible and liable for obtaining all necessary authorizations and rights to use, reproduce and share the publications provided to EFSA".

In practical terms in the context of systematic reviews, EFSA requires a list of references to be provided as part of the deliverables that does not entail any copyright issues. In addition, in case of systematic reviews full texts may be shared with EFSA for the sole purpose of assessing the completeness of deliverables. Full texts will not be part of final deliverables

PARTS OF RESULTS PRE-EXISTING THE CONTRACT

If the results are not fully created for the purpose of the contract this should be clearly pointed out in the tender. Information should be provided about the scope of pre-existing materials, their source and when and how the rights to these materials have been or will be acquired.

EFSA does not acquire ownership or any license of pre-existing rights not incorporated in the deliverables. The full ownership is limited to the deliverables, which might include licensed pre-existing rights on excerpts, parts, texts etc., if fully or partially incorporated in the final deliverables.

The draft contract in Annex 2 contains further provisions on ownership of intellectual property rights. All quotations or information the tenderer provides in the technical and financial offer for EFSA which originates from other sources to which third parties may claim rights, have to be clearly marked in the offer in a way allowing easy identification (source publications, including date & place, creator, number, full title etc.). The tenderer shall take account of the above specification on ownership and copyrights in their technical and financial offer.

1.5. PERSONAL DATA AND CONFIDENTIALITY

Processing of personal data by EFSA as contracting authority

Information on the processing of personal data by EFSA as contracting authority in charge of the present procurement procedure is available in the Privacy Statement on the EFSA website as well as in Article II.9.1 of the draft contract in Annex 2.

Please note that your personal data as a tenderer or selected contractor may be registered in the Early Detection and Exclusion System (EDES) if you are in one of the situations mentioned in Article 136 of the Financial Regulation. The relevant Privacy Statement is available on the European Commission's website, here: http://ec.europa.eu/budget/explained/management/protecting/protect_en.cfm#BDCE.

Processing of personal data by the selected contractor

In case tasks and activities under this call relate to the processing of personal data, Article II.9.2 of the draft contract in Annex 2 shall be observed.

For further information on data protection, please refer to the **EFSA guidance for tenderers** on the EFSA website, page 13.

Confidentiality

EFSA will disregard general statements that the whole tender or substantial parts of it contain confidential information. Tenderers need to mark clearly the information they consider confidential and explain why it may not be disclosed. EFSA reserves the right to make its own assessment of the confidential nature of any information contained in the tender.

PART 2 EVALUATION

HOW WILL YOUR OFFER BE ASSESSED?

In case you apply as a group of economic operators in a joint offer or if your offer envisages the use of subcontractors, please refer to the **EFSA Guidance for tenderers**.

2.1. OPENING OFFERS

The aim of the public opening session is to check whether the offer received was dispatched by the deadline for tender receipt and that the tenders are electronically protected until the official opening.

2.2. ORDER OF EVALUATION

Tenderers should note that the content of their offers will be assessed in the following pre-defined order:

1. Exclusion criteria (Access to EU Market);
2. Selection criteria (Technical & Professional capacity);
3. Compliance with tender specifications;
4. Award Criteria (Quality and Price).

Following the above assessment and identification of the winning tender, the following will be assessed only for the tenderer proposed for contract award: Selection criteria; Exclusion criteria (Declaration on Honour on exclusion criteria); Selection criteria (Declaration on Honour on selection criteria); Selection criteria (Economic & Financial capacity).

Evidence under sections 2.3 and 2.4 does not have to be submitted to EFSA if it has already been submitted in response to a previous EFSA call. In such case the evidence must be exactly the same as requested in these tender specifications and not older than 12 months. Please specify the reference of the EFSA call for tenders under which you have already submitted the evidence to EFSA if you chose to rely on such evidence.

2.3. GROUNDS FOR EXCLUSION

2.3.1. Eligibility – access to EU Market

Only offers from tenderers established in eligible countries will be allowed to the next step of the evaluation. Please refer to the **EFSA Guidance for tenderers** for further details.

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Evidence requested in your offer:

Tenderers must submit the Administrative data forms (including LEF and BAF) available here.

2.3.2. Exclusion

Tenderers must not be in one of the exclusion situations listed in article 136 of the Financial Regulation, explained in the **EFSA Guidance for tenderers**.

Evidence requested in your offer:

Tenderers must declare that they are not in one of the exclusion situations by providing a signed and dated Declaration on Honour on exclusion criteria, available here. In case of a joint offer from a group of economic operators, or in case of subcontracting, such declaration should be submitted for each member of the group and for each identified subcontractor.

Further supporting evidence in support of this declaration may be requested from the successful tenderer prior to signature of the contract. Such requested evidence will be specified in the award letter and may have to be provided to EFSA before the contract is signed.

2.4. SELECTION CRITERIA

In addition to the evidence requested below, EFSA has the right, during the evaluation process, to request further evidence on the tenderer's compliance with the economic, financial, technical and professional capacity requirements.

2.4.1. Selection criteria: Lot 1

2.4.1.1. (A) Economic and financial capacity

Criterion No.	Requirements and requested evidence
Lot1-A1	**Minimum economic and financial capacity**
	Requirements:
	The tenderer must have generated an overall annual turnover of at least 800,000 € in each of the last 3 closed financial years.
	Requested evidence:

	Declaration on Honour on selection criteria: Tenderers must declare they fulfil the economic and financial capacity by providing a signed and dated Declaration on Honour on selection criteria, available here. In case of a joint offer from a group of economic operators, such declaration should be completed by the leading partner only.

Naming convention: *Tenderers are requested to submit each evidence separately as one single Word or PDF file, using the evidence number as filename. For example: Lot1-A1.pdf.*

EFSA will request proof of annual turnover from the successful tenderer prior to signature of the contract. Such requested evidence will be specified in the award letter and must be provided to EFSA before the contract is signed. This evidence will be evaluated on a consolidated basis.

During contract implementation, in case of request for the addition of new subcontracting or assignment of the contract to a new legal entity, the economic and financial capacity will be checked for the last 3 most recent closed financial years and not necessarily the financial years published with the call.

2.4.1.2. (B) Professional capacity

The tenderer must have the following **minimum professional capacity** to perform the contract. Tenderers should provide a one page summary of the names of the individual Project team members.

Criterion No.	Requirements and requested evidence
Lot1-B1	**Two (2)** team members of role **"Project manager**"
	Requirements:
	1. At least 6 years of professional experience in managing projects that are similar to the tasks specified under section 1.2.1 (for example: implementation of surveys). 2. At least 3 of the 6 years of professional experience must have been gained in an international environment (in a multinational company, in a multinational team or with projects covering more than one country). 3. At least 3 of the 6 years of professional experience must include the management of project teams with at least 6 team members. 4. At least 3 projects concluded within the last 5 years where the contract value is equal to or higher than EUR 50,000. 5. At least 3 projects concluded within the last 5 years that required the management of more than 2 sub-contractors or, in the case of multinational enterprises, more than 2 subsidiaries.
	Requested evidence:

	• Detailed CVs[8] • List of projects that fulfil the requirements for the role, with indications on (1) contract value, (2) number of sub-contractors.
Lot1-B2	**One (1)** team member of the role "**Survey expert**"
	Requirements:
	1. At least 3 years of professional experience with planning, programming and implementing surveys. 2. At least 3 survey projects concluded within the last 5 years where the minimum sample size in each survey was 10,000 respondents. 3. At least 3 survey projects concluded within the last 5 years that required translation of the questionnaire into multiple (more than 2) languages.
	Requested evidence:
	• Detailed CV • List of concluded survey projects, with indications on (1) subject of the survey, (2) date of finalisation, (3) total sample size, (4) languages covered by the survey, (5) if publicly available, link to survey results.
Lot1-B3	**One (1)** team member of the role "**Data analyst**"
	Requirements:
	1. A university degree in statistics, mathematics, economics or another numerical field with a minimum duration of 4 years. 2. At least 3 years of professional experience as statistician, data analyst or in a similar numerical role. 3. At least 3 research projects concluded in which data analysis and data visualisation was performed using statistical software (R, Stata, SPSS, or similar software packages or programming languages).
	Requested evidence:
	• Detailed CV • List of concluded research projects, with indications on (1) type of data analysis performed, (2) software packages used.
Lot1-B4	**One (1)** team member of the role "**Research assistant**"
	Requirements:

[8] For all CVs, EFSA recommends to use EU CV format which can be accessed here: https://europa.eu/europass/en/create-europass-cv.

	1. At least 1 year of professional experience in the areas of the contract. 2. Involvement in at least 3 projects that required transcribing interviews, drafting summaries, performing desk research or other research support functions.
	Requested evidence:
	• Detailed CV
Lot1-B5	**English language capacity** of **all team members**
	Requirements:
	1. Each team member must have an excellent level of spoken and written standard UK English.
	Requested evidence:
	For non-native speakers, this should be demonstrated by an official certificate of English proving a C1 level OR at least 3 years of experience in an English-speaking environment, acquired either by work or education, to be indicated on the CV.

Naming convention: *Tenderers are requested to submit each evidence separately as one single Word or PDF file, using the criterion number as filename. For example: Lot1-B1.pdf.*

2.4.1.3. (C) Technical capacity

The tenderer must have the following **minimum technical capacity** to perform the contract:

Criterion No.	Requirements and requested evidence
Lot1-C1	Experience in conducting **surveys**, attested by **three (3) examples**
	Requirements:
	1. The survey has been finalised within the last 5 years. 2. The survey covered at least 5,000 respondents in total. 3. The survey was conducted in at least 3 different countries. 4. The survey was conducted in at least 3 different languages. 5. A final research report was prepared by the tenderer and includes data analysis and data visualisations of the survey results. **At least one** of the examples must be a **CAPI or CATI** survey.
	Requested evidence:

	• List of three survey projects conducted by the tenderer with information on (1) the finalisation date, (2) the overall number of respondents, (3) the countries covered, (4) the languages covered, (5) the mode (CAPI, CATI, CAWI). • Final research reports OR brief description of the projects.
Lot1-C2	Experience in conducting **interviews, focus groups and social experiments**, attested by **two (2) examples**
	Requirements:
	1. The project must have been finalised within the last 5 years. 2. The project covered at least 5 participants (interviewees, focus group participants or experiment participants). 3. A final research report was prepared by the tenderer. **At least one** of the examples must be an **interview or focus group**.
	Requested evidence:
	• List of two projects concluded by the tenderer with information on (1) finalisation date, (2) number of participants. • Final research reports OR brief description of the projects.
Lot1-C3	Ability to draft **research reports in English**, attested by **two (2) examples**
	Requirements:
	1. The tenderer is able to draft research reports in English
	Requested evidence:
	• Two of the research reports submitted for criterion Lot1-C1 or Lot1-C2 must be in English language **OR** • Submission of two research reports or similar documents drafted by the tenderer in English language of at least 5,000 words.
Lot1-C4	Technical resources to cover **all services** in **all mandatory countries**
	Requirements:
	1. The tenderer can cover computer-assisted personal interviewing (CAPI) surveys in all mandatory countries. 2. The tenderer can cover computer-assisted telephone interview (CATI) surveys in all mandatory countries. 3. The tenderer can cover computer-aided web interviewing (CAWI) surveys in all mandatory countries. 4. The tenderer can cover face-to-face interviews in all mandatory countries.

	5. The tenderer can cover telephone / online interviews in all mandatory countries. 6. The tenderer can cover face-to-face focus groups and social experiments in all mandatory countries. 7. The tenderer can cover telephone / online focus groups and social experiments in all mandatory countries.
	Requested evidence:
	In the table Lot 1 – countries.xlsx for each service listed above, list of the bodies intended to cover all **mandatory** countries listed in the technical specifications (see section 1.2.1). For the evaluation of the selection criterion, only information provided on the mandatory countries is relevant. However, information on maximum sample sizes for surveys and information on non-mandatory countries are relevant for the award criteria (see section 2.6.1).
Lot1-C5	Technical resources to provide **translation services**
	Requirements:
	1. The tenderer can provide translations from English into the other 23 official languages of the European Union. For this purpose, the tenderer has either inhouse or via subcontractors the capability to provide translations.
	Requested evidence:
	Please fill the table **Lot 1 – countries.xlsx**, sheet "**Translations**". The same institute can cover multiple or all languages, but each row should still be filled with the requested information.
Lot1-C6	**Declaration on Honour on selection criteria**
	Requirements:
	Signed declaration of honour.
	Requested evidence:
	Declaration on Honour on selection criteria available here. To be signed by the tenderer (in case of joint offer signed by the leading partner only);

***__Naming convention__**: Tenderers are requested to submit each evidence separately as one single Word or PDF file, using the evidence number as filename. For example: Lot1-C1.pdf.*

2.4.2. Selection criteria: Lot 2

2.4.2.1. (A) Economic and financial capacity

Criterion No.	Requirements and requested evidence
Lot2-A1	**Minimum economic and financial capacity**
	Requirements:
	The tenderer must have generated an overall annual turnover of at least 340,000 € in each of the last 3 closed financial years.
	Requested evidence:
	Declaration on Honour on selection criteria: Tenderers must declare they fulfil the economic and financial capacity by providing a signed and dated Declaration on Honour on selection criteria, available here. In case of a joint offer from a group of economic operators, such declaration should be completed by the leading partner only.

During contract implementation, in case of request for the addition of new subcontracting or assignment of the contract to a new legal entity, the economic and financial capacity will be checked for the last 3 most recent closed financial years and not necessarily the financial years published with the call.

2.4.2.2. (B) Professional capacity

The tenderer must have the following **minimum professional capacity** to perform the contract. Tenderers should provide a one page summary of the names of the individual Project team members.

Criterion No.	Requirements and requested evidence
Lot2-B1	**One (1)** team member of role "**Research manager**"
	Requirements:
	1. A university degree of at least 4 years. 2. At least 6 years of professional experience in conducting and managing research projects within a university or a private or public research institute. 3. At least 3 years of professional experience in managing and guiding multinational teams of researchers where the total number of internal and external team members is at least 5.

	4. At least 6 peer-reviewed publications or participation in research projects, where the language of publication or main working language is English.
	Requested evidence:
	• Detailed CV[9] • List of publications or research projects that fulfil the requirements of this role
Lot2-B2	**One (1)** team member of role "**Research analyst**"
	Requirements:
	1. A university degree of at least 4 years. 2. At least 3 years of professional experience in a field relevant to the technical specifications of this lot. 3. Participation in at least 3 research projects over the last 5 years that required qualitative research, such as performing discourse analysis, analysing interviews or open-ended survey responses, or similar research activities with unstructured data.
	Requested evidence:
	• Detailed CV • List of publications or research projects that fulfil the requirements of this role
Lot2-B3	**One (1)** team member of role "**Data analyst**"
	Requirements:
	1. A university degree of at least 4 years. 2. At least 3 years of professional experience in a field relevant to the technical specifications of this lot. 3. Participation in at least 3 research projects over the last 5 years that required data analysis beyond descriptive statistics, that is, the application of econometric techniques, machine learning, or similar advanced methods of data analysis.
	Requested evidence:
	• Detailed CV • List of publications or research projects that fulfil the requirements of this role
Lot2-B4	**One (1)** team member of role "**Research assistant**"

[9] For all CVs, EFSA recommends to use EU CV format which can be accessed here: https://europa.eu/europass/en/create-europass-cv.

	Requirements:
	1. A university degree of at least 3 years. 2. Experience in conducting desk research, literature reviews and discourse analysis, acquired by education or professional experience. 3. Experience in managing literature databases (for example Mendeley). 4. Good knowledge of Word, Excel and PowerPoint.
	Requested evidence:
	• Detailed CV
Lot2-B5	**English language capacity** of **all team members**
	Requirements:
	1. Each team member must have an excellent level of spoken and written standard UK English.
	Requested evidence:
	For non-native speakers, this should be demonstrated by an official certificate of English proving a C1 level OR at least 3 years of experience in an English-speaking environment, acquired either by work or education, to be indicated on the CV.

Naming convention: *Tenderers are requested to submit each evidence separately as one single Word or PDF file, using the criterion number as filename. For example: Lot2-B1.pdf.*

2.4.2.3. (C) Technical capacity

The tenderer must have the following **minimum technical capacity** to perform the contract:

Criterion No.	Requirements and requested evidence
Lot2-C1	Experience in conducting **data analysis**, attested by **two (2) examples**
	Requirements:
	Experience in conducting data analysis as specified in section 1.2.2.1 of the technical specifications, attested by 2 research projects or publications fulfilling the following requirements: 1. Project finalised within the last 5 years. 2. Statistical analysis of a dataset such as data published by statistical offices, survey data, or similar.

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	3. Visualisation of data.
	Requested evidence:
	• Submission of two research reports that meet the requirements.
Lot2-C2	Experience in conducting **qualitative research**, attested by **two (2) examples**
	Requirements:
	Experience in conducting qualitative research as defined in section 1.2.2.2 and 1.2.2.3 of the technical specifications, attested by 2 research projects or publications fulfilling the following requirements: 1. Project finalised within the last 5 years 2. Conduct of discourse analysis, target audience research or similar analyses of unstructured data.
	Requested evidence:
	• Submission of two research reports that meet the requirements.
Lot2-C3	Experience in conducting **literature reviews**, attested by **two (2) examples**
	Requirements:
	Experience in conducting literature reviews as defined in section 1.2.2.4 of the technical specifications, attested by 2 research projects or publications fulfilling the following requirements: 1. Project finalised within the last 5 years. 2. Definition of inclusion and exclusion criteria. 3. Review of at least 10 publications. 4. The literature review must include literature from a social science discipline or relate to the topic risk communication.
	Requested evidence:
	• Submission of two research reports that meet the requirements.
Lot2-C4	Ability to draft **research reports in English**, attested by **two (2) examples**
	Requirements:
	1. The tenderer is able to daft research reports in English
	Requested evidence:
	• Two of the research reports submitted for criterion Lot2-C1, Lot2-C2 or Lot2-C3 must be in English language **OR**

	• Submission of two research reports or similar documents drafted by the tenderer in English language of at least 5,000 words.

__Naming convention__: *Tenderers are requested to submit each evidence separately as one single Word or PDF file, using the criterion number as filename. For example: Lot2-C1.pdf.*

2.4.3. Selection criteria: Lot 3

2.4.3.1. (A) Economic and financial capacity

Criterion No.	Requirements and requested evidence
Lot3-A1	**Minimum economic and financial capacity**
	Requirements:
	The tenderer must have generated an overall annual turnover of at least 250,000 € in each of the last 3 closed financial years.
	Requested evidence:
	Declaration on Honour on selection criteria: Tenderers must declare they fulfil the economic and financial capacity by providing a signed and dated Declaration on Honour on selection criteria, available here. In case of a joint offer from a group of economic operators, such declaration should be completed by the leading partner only.

During contract implementation, in case of request for the addition of new subcontracting or assignment of the contract to a new legal entity, the economic and financial capacity will be checked for the last 3 most recent closed financial years and not necessarily the financial years published with the call.

2.4.3.2. (B) Professional capacity

The tenderer must have the following **minimum professional capacity** to perform the contract. Tenderers should provide a one page summary of the names of the individual Project team members.

Criterion No.	Requirements and requested evidence
Lot3-B1	**One (1)** team member of role "**Project manager**"

	Requirements:
	1. At least 6 years of professional experience. 2. At least 3 of the 6 years of professional experience must have been gained in an international environment (in a multinational company with operations in more than one country, in a multinational team where team members are located in more than one country or with projects that require work in more than one country). 3. At least 3 of the 6 years of professional experience must include the management of project teams with at least 6 team members. 4. At least 3 projects concluded within the last 5 years where the contract value is equal to or higher than EUR 50,000. 5. At least 3 projects concluded within the last 5 years that required the management of more than 2 sub-contractors or, in the case of multinational enterprises, more than 2 subsidiaries.
	Requested evidence:
	• Detailed CV[10] • List of projects that fulfil the requirements for the role, with indications on (1) contract value, (2) number of sub-contractors.
Lot3-B2	**Two (2)** team members of role "**Survey expert**"
	Requirements:
	1. At least 3 years of professional experience with planning, programming and implementing surveys. 2. At least 3 survey projects concluded within the last 5 years where the minimum sample size in each survey was 10,000 respondents. 3. At least 3 survey projects concluded within the last 5 years that required translation of the questionnaire into more than 2 languages.
	Requested evidence:
	• Detailed CV • List of projects that fulfil the requirements for the role, with indications on (1) contract value, (2) number of sub-contractors.
Lot3-B3	**English language capacity** of **all team members**
	Requirements:

[10] For all CVs, EFSA recommends to use EU CV format which can be accessed here: https://europa.eu/europass/en/create-europass-cv.

	1. Each team member must have an excellent level of spoken and written standard UK English.
	Requested evidence:
	For non-native speakers, this should be demonstrated by an official certificate of English proving a C1 level OR at least 3 years of experience in an English-speaking environment, acquired either by work or education, to be indicated on the CV.

Naming convention: *Tenderers are requested to submit each evidence separately as one single Word or PDF file, using the criterion number as filename. For example: Lot3-B1.pdf.*

2.4.3.3. (C) Technical capacity

The tenderer must have the following **minimum technical capacity** to perform the contract:

Criterion No.	Requirements and requested evidence
Lot3-C1	**Mandatory minimum country coverage**
	Requirements:
	1. The tenderer must be able to cover all 4 countries of country group I. 2. The tenderer must be able to cover all 6 countries of country group II. 3. The tenderer must be able to cover at least 10 countries of country group III.
	Requested evidence:
	List of the bodies intended to cover all countries in country group I, II and III with indications on (1) name, postal address and, if available, website of the body, (2) if the minimum sample size can be covered. Tenderers are requested to fill **Lot 3 – Country groups.xlsx**[11]
Lot3-C2	**Compliance with service level agreements (SLAs)**
	Requirements:
	1. The provider is able to comply with SLA 1, 2 and 3. (See section 1.2.3.5 for a definition of the SLAs)
	Requested evidence:

[11] Some of the information provided in this document will also be used in the award decision, see section 2.6.3. Therefore, although for the selection criterion there are only 15 countries required in country group III and none in country group IV, tenderers are still requested to provide information on all countries they can cover.

	• Document describing the measures in place that guarantee compliance with the SLAs.
Lot3-C3	**Minimum sample sized and data delivery timeframes**
	Requirements:
	1. Ability to deliver final data for all countries in country group I, II and III within 7 working days after receiving the request initiating the fieldwork phase. That is, if a tenderer offers more than 15 countries in country group III, they must still ensure delivery within at most 7 working days for all countries. 2. Ability to meet the minimum sample sizes established in section 1.2.3.
	Requested evidence:
	Tenderers are requested to fill **Lot 3 – Country groups.xlsx**
Lot3-C4	Experience in conducting **flash polls**, attested by **two (2) examples**
	Requirements:
	1. Project concluded within the last 5 years. 2. At least 3 of the countries in country group I, II or III were covered. 3. The sample size in at least 3 countries was 100 or more. 4. The time between finalisation of the master questionnaire and delivery of final data to the customer was 10 working days or less.
	Requested evidence:
	• Description of the project covering information on (1) the topic, (2) the date of finalisation of the master questionnaire, (2) a list of all countries covered and the sample size in each country • If publicly available, reference to the final data and / or research report

Naming convention: *Tenderers are requested to submit each evidence separately as one single Word or PDF file, using the criterion number as filename. For example: Lot3-C1.pdf.*

2.4.4. Selection criteria: Lot 4

2.4.4.1. (A) Economic and financial capacity

The tenderer must have generated an overall annual turnover of at least 500,000 € in each of the last 3 closed financial years.

Evidence requested in the offer:

Tenderers must declare they fulfil the economic and financial capacity by providing a signed and dated Declaration on Honour on selection criteria, available here. In case of a joint offer from a group of economic operators, such declaration should be completed by the leading partner only.

EFSA will request proof of annual turnover from the successful tenderer prior to signature of the contract. Such requested evidence will be specified in the award letter and must be provided to EFSA before the contract is signed. This evidence will be evaluated on a consolidated basis.

During contract implementation, in case of request for the addition of new subcontracting or assignment of the contract to a new legal entity, the economic and financial capacity will be checked for the last 3 most recent closed financial years and not necessarily the financial years published with the call.

2.4.4.2. (B) Technical and professional capacity

The tenderer must have the following **minimum technical and professional capacity** to perform the contract. Tenderers should provide a one page summary of the names of the individual Project team members.

Criterion No.	Requirements and requested evidence
Lot4-B1	**One (1)** team member of role "**Project manager**"
	Requirements:
	1. At least 3 years of professional experience in managing projects related to User research, applied to digital products. 2. At least 1 year of professional experience with managing teams of at least 3 team members. 3. At least three (3) projects concluded in the last 5 years that required work in a multinational environment, that is, either contractors and / or customers in a country different from the tenderer's country.
	Requested evidence:
	• Detailed CV[12] • List of projects that fulfil the requirements of this role

[12] For all CVs, EFSA recommends to use EU CV format which can be accessed here: https://europa.eu/europass/en/create-europass-cv.

Lot4-B2	**One (1)** team member of role "**User researcher**"
	Requirements:
	1. At least 7 years experience of delivering robust qualitative findings through qualitative, quantitative and mixed-methods research approaches. Methods should include contextual observation, quantitative data analysis, surveys, interviews and focus groups, including recruitment of a relevant set of users, and developing topic materials (at least 3 projects with >1M sessions/year, across multiple channels) 2. At least 3 years experience of planning and managing research throughout all phases of a project. 3. At least 5 years experience in distilling outcomes from user-needs led research into clear findings and actionable insights used to drive decisions when designing content, product and services (at least 3 projects with >1M sessions/year, across multiple channels) 4. Experience in at least 2 projects of successfully upskilling and mentoring internal user research capability at the client's organization. 5. Ability to work with users and stakeholders at all levels. Demonstrable experience of successfully using insights from user research to make recommendations that changed the approach of senior/board-level decision makers
	Requested evidence:
	• Detailed CV • List of projects that fulfil the requirements of this role
Lot4-B3	**One (1)** team member of role "**Junior User researcher**"
	Requirements:
	1. At least 3 years experience of delivering qualitative findings through qualitative, quantitative and mixed-methods research approaches. Methods should include contextual observation, quantitative data analysis, surveys, interviews and focus groups, including recruitment of a relevant set of users, and developing topic materials. 2. At least 2 years experience in distilling outcomes from user-needs led research into clear findings and actionable insights, used to drive decisions when designing content, product and services 3. Demonstrable experience in presenting insights from user research to stakeholders at all levels
	Requested evidence:

	• Detailed CV • List of projects that fulfil the requirements of this role
Lot4-B4	**One (1)** team member of role "**Usability evaluation expert**"
	Requirements:
	1. At least 2 years of professional experience in developing and implementing Usability analysis plans to provide actionable insights to shape products' roadmaps and design 2. At least 2 projects concluded in the last 5 years conducting usability analysis 3. Experience in applying usability testing and evaluation in all phases of a product development. 4. Participated to at least 3 projects in the last 7 years with >1M sessions/year, across multiple products
	Requested evidence:
	• Detailed CV • List of projects that fulfil the requirements of this role
Lot4-B5	**English language capacity** of **all team members**
	Requirements:
	1. Each team member must have an excellent level of spoken and written standard UK English.
	Requested evidence:
	For non-native speakers, this should be demonstrated by an official certificate of English proving a C1 level OR at least 3 years of experience in an English-speaking environment, acquired either by work or education, to be indicated on the CV.

Naming convention: *Tenderers are requested to submit each evidence separately as one single Word or PDF file, using the criterion number as filename. For example: Lot4-B1.pdf.*

□ **Declaration on Honour on selection criteria** available here. To be signed by the tenderer (in case of joint offer signed by the leading partner only);

2.5. COMPLIANCE WITH TENDER SPECIFICATION AND MINIMUM REQUIREMENTS

Your offer will be assessed for compliance with the tender specifications before its assessment against the award criteria.

Tenders do not comply with the tender specifications and will be rejected if they:

- do not comply with minimum requirements laid down in the tender specifications;
- propose a solution different from the one imposed;
- propose a price above the fixed maximum set in the specifications;
- are submitted as variants, when the specifications do not authorise them;
- do not comply with applicable obligations under environmental, social and labour law established by Union law, national law and collective agreements or by the international environmental, social and labour law provisions listed in Annex X to Directive 2014/24/EU[13] and compliance with data protection obligations resulting from Regulation (EU) 2016/679 and Regulation (EU) 2018/1725[14].

The grounds for rejection is not linked to the award criteria so there is no evaluation. The tenderer will be informed of the grounds for rejection without being given feedback on the content of the tender other than on the non-compliant elements.

2.6. AWARD CRITERIA

Tenders will be evaluated against the below award criteria. The award criteria serve to identify the **most economically advantageous offer**.

[13] OJ L 94 of 28.03.2014, p. 65

[14] Regulation (EU) 2018/1725 of the European Parliament and of the Council of 23 October 2018 on the protection of individuals with regard to the processing of personal data by the Union institutions, bodies, offices and agencies and on the free movement of such data and repealing Regulation (EC) No 45/2001 and Decision No 1247/2002/EC, OJ L 295/39 21.11.2018, https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32018R1725&from=EN

2.6.1. Award criteria: Lot 1

2.6.1.1. (A) Quality award criteria

Tenderers must provide a **detailed technical offer** addressing all points in the technical specifications and each of the quality award criteria. Repetition of mandatory requirements in the technical specifications without providing detail in the technical offer will only result in a very low score.

No.	Award criteria	Max. points
1	**Project organisation**	**25**
	Requested material (suggestion: maximum 10 pages A4 format): • Short and general presentation of the company and its organisational structure in relation to sub-contractors. • Team organisation: Information on distribution of the tasks defined in the technical specifications among the project team. • In case of joint offer and subcontractors, clarity on who does what, when and why (justify why the partner / subcontractor is proposed to do the particular task).	
	Assessment criteria:	
1.1	Overall clarity and detail of the information provided	5
1.2	Appropriateness of organisational structure to deliver the requested tasks	10
1.3	Effective and efficient distribution of tasks within the project team and, if applicable, effective and efficient collaboration with partnering bodies.	10
2	**Ability to deliver services**	**25**

	This criterion will assess the capability of the tenderer to perform the requested tasks at scale and in multiple countries.
	Requested material:
	• *In Lot 1 – countries.xlsx* fill all sheets
	  ○ For sheets "Surveys-CAPI", "Surveys-CATI" and "Surveys-CAWI": Column 7) Maximum sample size must refer to the maximum available sample size representative of the general population aged 15 years or more, as a minimum by gender, age group, and NUTS 2 region
	  ○ Indicate for each service which non-mandatory countries can be covered (if any).	

	Assessment criteria:	
2.1	Overall clarity and detail of the information provided	5
2.2	Maximum guaranteed sample size for surveys	10

2.3	Effectiveness and efficiency in collaboration with experts for interviews, focus groups and experiments	5
2.4	Coverage of "non-mandatory" countries[15]	5
3	**Methodology and survey fieldwork**	**25**
	This criterion will assess the effectiveness of the methods, procedures and techniques proposed to conduct the services specified in section 1.2.1. *Requested material (suggestion: maximum 15 pages A4 format):* • Proposed methodology for conducting the requested services • Presentation of the survey tools used to conduct surveys, including information on their flexibility in terms of different question types and survey logic and how a similar survey experience is guaranteed in different languages. • Discussion of the advantages and disadvantages of different survey methods (CAPI, CATI, CAWI) and how to overcome issues of representativeness, both at national level and at the level of certain demographic groups.	
	Assessment criteria:	
3.1	Overall clarity and detail of the information provided	5
3.2	Quality of the methodology	10
3.3	Technical capabilities of the survey tools	5
3.4	Likely effectiveness of measures proposed to guarantee representativeness in surveys	5
4	**Case study**	**25**
	For this criterion, the tenderer is requested work on the case study described in annex section 3.4.1.	
	Assessment criteria:	
4.1	Overall clarity and detail of the information provided	5
4.2	Target audience identification	5
4.3	Research method selection and rationale	5
4.4	Quality and appropriateness of survey question examples	10

[15] Full points will be awarded if all services can be offered for all non-mandatory countries. If only some services or some non-mandatory countries can be covered, points will be awarded based on the percentage covered.

The sum of all quality award criteria gives a maximum possible total of 100 points.

Offers must score at least **50% for each criterion**, and **at least 70% of maximum possible total points** against the quality award criteria.

Tenders that do not reach these minimum quality thresholds will be eliminated from subsequent stages of the evaluation process.

2.6.1.2. (B) Price award criterion

Tenders which passed the quality thresholds will be further assessed to ensure:

I. the financial offer satisfies the formal requirements of the tender specifications.

2.6.1.3. (C) The best price-quality ratio

Tenders that satisfied the formal requirements indicated in the tender specification will be retained for the identification of the tender with the best price-quality ratio based on the following formula:

TOTAL SCORE OF THE EVALUATED OFFER (C) = **40 * Cheapest price offer/price of tender X** **+** **60 * Total quality score (out of 100) for all quality award criteria of tender X/100**

2.6.2. Award criteria: Lot 2

2.6.2.1. (A) Quality award criteria

Tenderers must provide a **detailed technical offer** addressing all points in the technical specifications and each of the quality award criteria. Repetition of mandatory requirements in the technical specifications without providing detail in the technical offer will only result in a very low score.

No.	Award criteria	Max. points

1	**Project organisation**	**30**
	Requested material (suggestion: maximum 10 pages A4 format): • Short and general presentation of the company and its organisational structure in relation to sub-contractors. • Team organisation: Information on distribution of the tasks defined in the technical specifications among the project team. • In case of joint offer and subcontractors, clarity on who does what, when and why (justify why the partner / subcontractor is proposed to do the particular task). • Example of a project plan to conduct projects similar to the ones defined in the technical specifications.	
	Assessment criteria:	
1.1	Overall clarity and detail of the information provided	5
1.2	Appropriateness of organisational structure to deliver the requested tasks	5
1.3	Effective and efficient distribution of tasks within the project team and, if applicable, effective and efficient collaboration with partnering bodies.	10
1.4	Quality of the sample project plan	10
2	**Methodology**	**40**
	Requested material (suggestion: maximum 15 pages A4 format): For each task specified in the technical specifications (see section 1.2.2), the tenderer is requested to propose: • A general methodology. • Details on methods and tools used to achieve the task. • Quality control measures. • Discuss how the outcome of each task can influence communication strategies of EU bodies.	
	Assessment criteria:	
2.1	Overall clarity and detail of the information provided	10
2.2	Scientific excellence of proposed methodologies	15
2.3	Understanding of tasks in relation to communication strategies	15
3	**Case study**	**30**
	For this criterion, the tenderer is requested work on the case study described in annex section 3.4.2.	
	Assessment criteria:	
3.1	Overall clarity and detail of the information provided	10
3.2	Description of literature review process and paper synopsis	10

3.3	Discourse analysis techniques and coverage	10

The sum of all quality award criteria gives a maximum possible total of 100 points.

Offers must score at least **50% for each criterion**, and **at least 70% of maximum possible total points** against the quality award criteria.

Tenders that do not reach these minimum quality thresholds will be eliminated from subsequent stages of the evaluation process.

2.6.2.2. (B) PRICE AWARD CRITERION

Tenders which passed the quality thresholds will be further assessed to ensure:

I. the price offer is made within the maximum budget for financial offers indicated in the tender specifications and;
II. the financial offer satisfies the formal requirements of the tender specifications.

2.6.2.3. (C) THE BEST PRICE-QUALITY RATIO

Tenders for which financial offers were made within the maximum budget and satisfied the formal requirements indicated in the tender specification will be retained for the identification of the tender with the best price-quality ratio based on the following formula:

TOTAL SCORE OF THE EVALUATED OFFER (C)
=
30 * Cheapest price offer/price of tender X
+
70 * Total quality score (out of 100) for all quality award criteria of tender X/100

2.6.3. Award criteria: Lot 3

2.6.3.1. (A) Quality award criteria

Tenderers must provide a **detailed technical offer** addressing all points in the technical specifications and each of the quality award criteria. Repetition of mandatory requirements in the technical specifications without providing detail in the technical offer will only result in a very low score.

No.	Award criteria	Max. points
1	**Project organisation**	**20**
	Requested material (suggestion: maximum 10 pages A4 format): • Short and general presentation of the company and its organisational structure in relation to sub-contractors. • Team organisation: Information on distribution of the tasks defined in the technical specifications among the project team. • In case of joint offer and subcontractors, clarity on who does what, when and why (justify why the partner / subcontractor is proposed to do the particular task).	
	Assessment criteria:	
1.1	Overall clarity and detail of the information provided	5
1.2	Effective and efficient distribution of tasks within the project team	5
1.3	Effective and efficient collaboration with partnering bodies at national level	10
2	**Quality control and service consistency**	**15**
	Requested material (suggestion: maximum 15 pages A4 format): • Describe how sampling is done, how survey respondents are recruited, if and how survey respondents are compensated for participation in survey. • Provide insights into the survey tool used, how it works, what interface survey respondents will see. • Discuss the opportunities and challenges of computer-aided web interviewing (CAWI) with a focus on how to ensure scientific excellence. • Propose a methodology for conducting repeated surveys (that is, where the same survey is conducted after a certain time period).	
	Assessment criteria:	
2.1	Overall clarity and detail of the information provided	5
2.2	Measures in place to guarantee quality and representativeness of the results	5
2.3	Measures in place to ensure service level agreements are met	5

3	**Interaction with the customer and direct data access**	**15**
	Requested material (suggestion: maximum 10 pages A4 format) • Develop a simple project schedule for launching a flash poll • Specify when and how the customer can access raw data (that is, will data be delivered as email attachment or can the customer access data directly in the system or via API)	
	Assessment criteria:	
3.1	Overall clarity and detail of the information provided	5
3.2	Compliance of the project schedule with the technical specifications	5
3.3	Convenience of data access	5
4	**Data delivery**	**50**

This criterion will assess the ability of the tenderer to deliver timely data.
Requested material: The tenderer is requested to fill table **Lot 3 – Country groups SLA.xlsx**

There are two criteria for each country group:

- Working days for data delivery: For each country group, the average number of working days for data delivery will be calculated. Half working days or fractions of a working day will be rounded to the next full working day. Each country within a country group will have the same weight. The tenderer with the shortest average number of working days will get the maximum number of points. For any average number of working days *X*, and the maximum number of achievable points *z*, the award of points will be calculated as:

$$Points = \frac{X - X_{Max}}{X_{Min} - X_{Max}} \times z$$

If no country is offered in country group IV, this will result in 0 points for award criterion 4.8.

For example: Assume 4 offers from company A, B, C and D pass the selection criteria. For country group I, where the maximum number of achievable points *z* is 10, the following table demonstrates the calculation:

Company	Average no. of working days	Achieved points
A	5	$\frac{5-10}{5-10} \times 10 = 10$
B	7	$\frac{7-10}{5-10} \times 10 = 6$
C	8	$\frac{8-10}{5-10} \times 10 = 4$

D	10	$\frac{10-10}{5-10} \times 10 = 0$

In this example, company A is X_{Min} (5) and company D is X_{Max} (10).

- Sample size: For each country group, the average number of maximum sample size will be calculated. Each country within a country group will have the same weight. The maximum sample size for an individual country shall be 2,000. The tenderer with the largest average number of sample size will get the maximum number of points. For any average number of sample size *X*, and the maximum number of achievable points *z*, the award of points will be calculated as:

$$Points = \frac{X - X_{Min}}{X_{Max} - X_{Min}} \times z$$

If no country is offered in country group IV, this will result in 0 points for award criterion 4.9.

For example: Assume 4 offers from company A, B, C and D pass the selection criteria. For country group I, where the maximum number of achievable points *z* is 10, the following table demonstrates the calculation:

Company	Average no. of sample size	Achieved points
A	450	$\frac{450-250}{450-250} \times 10 = 10$
B	400	$\frac{400-250}{450-250} \times 10 = 7.5$
C	300	$\frac{300-250}{450-250} \times 10 = 2.5$
D	250	$\frac{250-250}{450-250} \times 10 = 0$

Additionally, for country groups III and IV:

- Coverage: The ability to cover all countries of the country group will result in full points for criteria 4.7 and 4.10. If only some countries can be covered, points will be given as a fraction of total coverage.
For example, full 5 points for award criterion 4.7 will be awarded if the tenderer can offer all 19 countries of country group III. If only 15 countries can be covered, this results in:

$\frac{15}{19} \times 5 = 3.95$

Assessment criteria:

4.1	Country group I: Working days for data delivery	10
4.2	Country group I: Sample size	10
4.3	Country group II: Working days for data delivery	5
4.4	Country group II: Sample size	5
4.5	Country group III: Working days for data delivery	5
4.6	Country group III: Sample size	5
4.7	Country group III: Coverage	5
4.8	Country group IV: Working days for data delivery	1.5
4.9	Country group IV: Sample size	1.5
4.10	Country group IV: Coverage	2

The sum of all quality award criteria gives a maximum possible total of 100 points.

Offers must score at least **50% for each criterion**, and **at least 70% of maximum possible total points** against the quality award criteria.

Tenders that do not reach these minimum quality thresholds will be eliminated from subsequent stages of the evaluation process.

2.6.3.2. (B) PRICE AWARD CRITERION

Tenders which passed the quality thresholds will be further assessed to ensure:

I. the financial offer satisfies the formal requirements of the tender specifications.

2.6.3.3. (C) THE BEST PRICE-QUALITY RATIO

Tenders that satisfied the formal requirements indicated in the tender specification will be retained for the identification of the tender with the best price-quality ratio based on the following formula:

TOTAL SCORE OF THE EVALUATED OFFER (C) =

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40 * Cheapest price offer/price of tender X
+
60 * Total quality score (out of 100) for all quality award criteria of tender X/100

Please refer to annex section 3.2.3 for details on the financial offer template and how the price of tender is calculated.

2.6.4. Award criteria: Lot 4

2.6.4.1. (A) Quality award criteria

Tenderers must provide a **detailed technical offer** addressing all points in the technical specifications and each of the quality award criteria. Repetition of mandatory requirements in the technical specifications without providing detail in the technical offer will only result in a very low score.

No.	Award criteria	Max. points
1	**Project organisation**	**20**
	Requested material (suggestion: maximum 10 pages A4 format): • Short and general presentation of the company and its organisational structure in relation to sub-contractors • Team organisation: Information on distribution of the tasks among the project team • In case of joint offer and subcontractors, clarity on who does what, when and why (justify why the partner/subcontractor is proposed to do the particular task/work-package) • Measures that ensure delivery of results even under high workload and tight deadlines	
	Assessment criteria:	
1.1	Overall clarity and detail of the information provided	6
1.2	Effective and efficient distribution of tasks within the project team	7
1.4	Continuity and consistency of service delivery from planning to reporting	7
2	**Methodology**	**30**

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	Requested material (suggestion: maximum 20 pages A4 format): For each task specified in the technical specifications (see section 1.2.4), the tenderer is requested to propose: • A general methodology • Details on methods and tools used to achieve the task. Discuss how the outcome of each task can influence the development of digital products of EU bodies	
	Assessment criteria:	
2.1	Overall clarity and detail of the information provided	5
2.2	Understanding of tasks in relation to the services requested in this lot	10
2.3	Measures in place to guarantee quality and representativeness of the results	10
2.4	Additional methodology proposed beyond the minimum requirements	5
4	**Case study**	**50**
	For this criterion, the tenderer is requested to provide the case study described in annex section 3.4.3	
	Assessment criteria:	
4.1	Overall clarity and detail of the information provided	10
4.2	Goals and objectives identification and rationale	10
4.3	Clarity and detail of the action plan for the initial phase	10
4.4	Scope & focus identification and rationale	10
4.5	Methodologies selection and rationale	10

The sum of all quality award criteria gives a maximum possible total of 100 points.

Offers must score at least **70% on the case study, criteria 4**, and **at least 70% of maximum possible total points** against the quality award criteria.

Tenders that do not reach these minimum quality thresholds will be eliminated from subsequent stages of the evaluation process.

2.6.4.2. (B) PRICE AWARD CRITERION

Tenders which passed the quality thresholds will be further assessed to ensure:

I. the price offer is made within the maximum budget for financial offers indicated in the tender specifications and;

II. the financial offer satisfies the formal requirements of the tender specifications.

2.6.4.3. (C) THE BEST PRICE-QUALITY RATIO

Tenders for which financial offers were made within the maximum budget and satisfied the formal requirements indicated in the tender specification will be retained for the identification of the tender with the best price-quality ratio based on the following formula:

TOTAL SCORE OF THE EVALUATED OFFER (C) = **30 * Cheapest price offer/price of tender X** **+** **70 * Total quality score (out of 100) for all quality award criteria of tender X/100**

2.6.5. Award criteria for re-opening of competition – Lot 1

These award criteria will be used during the implementation of the framework contract, for each re-opening of competition.

No.	Award criteria	Max. points
1	**Project organisation**	**20**
	Requested material (suggestion: maximum 10 pages A4 format): • Team organisation: Information on distribution of the tasks defined in the technical specifications among the project team. • In case of joint offer and subcontractors, clarity on who does what, when and why (justify why the partner / subcontractor is proposed to do the particular task).	

	• Detailed project plan including timeline, milestones and deliverables.	
	Assessment criteria:	
1.1	Effective and efficient distribution of tasks within the project team, and, if applicable, effective and efficient collaboration with partnering bodies at national level.	10
1.2	Quality and clarity of the project plan.	10
2	**Methodology proposed for implementation**	**50**
	Requested material (suggestion: maximum 10 pages A4 format): • Overview of the proposed methodological approach in relation to the technical specifications, including scientific justifications for the chosen approach. • Discussion of potential risks and issues associated with the proposed methodology, and proposals on strategies how to mitigate these risks and issues.	
	Assessment criteria:	
2.1	Overall scientific excellence of the proposed methodology.	10
2.2	Conformity of methodology with the technical specification and justification of the choice of proposed methodology focusing on its advantages.	20
2.3	Completeness of identified risks and issues and likely effectiveness of proposed mitigation strategies.	20
3	**Measures to guarantee quality of deliverables**	**30**
	Requested material (suggestion: maximum 10 pages A4 format): Discussion of quality assurance mechanisms put in place to guarantee the high quality of deliverables: • At the planning phase (for example survey questionnaire preparation, sampling, focus group / interview / experiment guide preparations, and similar). • At the implementation phase (for example survey fieldwork, conduct of focus groups / interviews / experiments, and similar). • At the finalisation phase (for example data processing and analysis, drafting of summary reports, and similar).	
	Assessment criteria:	
3.1	Quality measures at the planning phase.	10
3.2	Quality measures at the implementation phase.	10
3.3	Quality measures at the finalisation phase.	10

The sum of all quality award criteria gives a maximum possible total of 100 points.

Offers must score at least **50% for each criterion**, and **at least 70% of maximum possible total points** against the quality award criteria.

Tenders that do not reach these minimum quality thresholds will be eliminated from subsequent stages of the evaluation process.

2.6.5.1. (B) Price award criterion

Tenders which passed the quality thresholds will be further assessed to ensure:

I. the price offer is made within the maximum budget for financial offers indicated in the tender specifications and;

II. the financial offer satisfies the formal requirements of the tender specifications.

2.6.5.2. (C) The best price-quality ratio

Tenders for which financial offers were made within the maximum budget and satisfied the formal requirements indicated in the tender specification will be retained for the identification of the tender with the best price-quality ratio based on the following formula:

TOTAL SCORE OF THE EVALUATED OFFER (C) =
~~**30**~~ **40* Cheapest price offer/price of tender X**
+
~~**70**~~ **60* Total quality score (out of 100) for all quality award criteria of tender X/100**

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PART 3 Annex

3.1. HOW TO SUBMIT YOUR OFFER USING E-SUBMISSION

You must submit your tender electronically via the e-Submission application available from the e-Tendering website before the time limit for receipt of tenders.

The e-Submission application allows economic operators to respond to call for tenders by preparing their tenders electronically in a structured and secured way and submitting their tenders electronically. The e-Tendering is the starting point for launching the e-Submission application.

Make sure you submit your tender on time: you are advised to start completing your tender early. To avoid any complications with regard to late receipt/non- receipt of tenders within the deadline, please ensure that you submit your tender several hours before the deadline. A tender received after the deadline indicated in the procurement documents will be rejected.

Registration in the Participant Register

Any economic operator willing to submit a tender must be registered in the Participant Register - an online register of organisations and natural persons participating in European Commission's calls for tenders or proposals.

On registering each participant obtains a Participant Identification Code (PIC, 9 - digit number) which acts as its unique identifier in the Participant Register. A participant needs to register only once – the information provided can be further updated or re-used by the participant in other European Commission's calls for tenders or calls for proposals.

At any moment during the procurement procedure the Research Executive Agency Validation Services (hereafter *the EU Validation Services)* may contact the participant and ask for supporting documents on legal existence and status [and financial capacity].

The requests will be made through the register's messaging system to the e-mail address of the participant's contact person indicated in the register. It is the responsibility of the participant to provide a valid e-mail address and to check it regularly.

The documents that may be requested by *the EU Validation Services* are listed in the EU Grants and Tenders Rules on Legal Entity Validation, LEAR appointment and Financial Capacity assessment.

Please note that a request for supporting documents by the *EU Validation Services* in no way implies that the tenderer has been successful.

How to Submit your Tender in e-Submission

You can access the e-Submission application via the corresponding call for tender in TED e-Tendering, as specified in the Invitation Letter.

In order to have access to e-Submission, you will need to "Subscribe to call for tenders" on TED e-Tendering first. To subscribe, you will need to login with your an EU Login[16]. In case you don't have an EU Login, you can create an account at any moment. For more information see the EU login help. After logging in with your EU Login password, the e-Tendering will then display a button 'submit your tender' and you will be able to access the e-Submission.

The e-Submission "quick guide for economic operators" is available after logging in with your EU Login password.

Information to be filled in

In the e-Submission application, fill in and upload all necessary fields and documents as appropriate. All tenders must be clear, complete and consistent with all the requirements laid down in the tender specifications, including:

- **Signed declaration on Honour on Exclusion criteria.** All members of a joint tender, including subcontractors – if applicable – must upload the signed and dated declaration on honour on exclusion criteria using the template available here.
- **Signed declaration on Honour on Selection criteria.** In case of a joint offer from a group of economic operators, such declaration should be completed by the leading partner using the template available here.
- **Exclusion criteria**. If requested in the tender specifications, the tenderer and all members of a joint tender including subcontractors – if applicable – must provide the documentary evidence for exclusion criteria.

[16] Previously called European Commission authentication system (ECAS)

- **Selection criteria.** If requested in the tender specifications, the tenderer and all members of a joint tender including subcontractors – if applicable –, must provide the documentary evidence for selection criteria.
- **Technical tender.** It must address all the requirements laid down in the tender specifications.
- **Financial tender** The complete financial tender, including the breakdown of the price as provided in the tender specifications.

For detailed instructions on how to submit your tender, consult the Quick Reference Guide for Economic Operators where you will find:

- Technical requirements to use e-Submission
- Step-by-step guide to help you submit your tender
- Important advices and information on how to get technical support

***Please make sure all required documents and evidence are submitted with your tender*.**

Documents to be signed and dated while creating your Tender

The following documents must be signed and dated during the creation of your tender in e-Submission:

- **Declaration on honour(s).** All members of a joint tender, including subcontractors must sign and date the declaration on Exclusion criteria. Only the leader in a joint tender must sign and date the declaration on Selection criteria. The declaration on honour(s) must be converted to PDF format and then signed by the authorised representatives with advanced electronic signature based on qualified certificates or by hand.

Re-submission of a tender

After submitting a tender, but within the time limit for receipt of tenders, you may still submit a new version of your tender. **If you submit a new Tender you must include all your Tender documents, including the Qualification and Tender documents.**

You must formally notify EFSA that the previous tender is withdrawn. The notification letter must be signed by the legal representative who signed the original tender stating the call reference and the Tender ID you wish to withdraw. The notification must be uploaded in e-submission together with the new version of all tender documents. You are kindly requested to also e-mail the notification letter to EFSAProcurement@efsa.europa.eu.

Withdrawal of tenders

If after submitting a tender, you wish to completely withdraw your tender, you must formally notify EFSA that you wish to withdraw your submitted Tender(s) as indicated above.

Alternative tender

You are entitled to send several tenders to one call for tenders.

Deadline for receipt of tenders

The tender (including all documents) must be fully uploaded and received before the deadline for receipt of tenders indicated in the invitation to tender.

Please note that you are responsible to ensure that your full tender reaches the destination in due time.

In case of problems with the submission of the electronic tender, we recommend that you call the helpdesk in reasonable time before the time limit for receipt. The time it takes to submit the tender and upload all your documents may vary considerably depending on the number of concurrent submissions by other economic operators, the size of your tender and the type of internet service you are using. We recommend that you upload the documents the day before the deadline.

If the contracting authority detects technical faults in the functioning of the electronic equipment used for submitting and receiving tenders due to which it is impossible to electronically submit and receive tenders, you will be informed of the extension of the time limit by the contracting authority at the e-Tendering link.

For more information or technical support on e-Submission, please visit the e-Submission help site.

Contact

- ~~The original hand signed tender report must be scanned and sent by email immediately after submission, to the following address: EFSAProcurement@efsa.europa.eu.~~

- Notifications for re-submission or withdrawal of tenders must be sent to:

  EFSAProcurement@efsa.europa.eu

  When communicating state the reference to the call for tenders and, if applicable, the Tender ID.

3.2. FINANCIAL OFFER TEMPLATE

The template to be used for preparing your financial offer is available as an Excel file and is uploaded in e-Tendering with all other procurement documents.

Tenderers are requested to modify only cells shaded in orange. The template must not be modified.

3.2.1. Financial offer template: Lot 1

Tenderers are requested to fill the sheet "Lot 1".

(A) Cost of the research team: Daily rates.

Any cost in relation to project management, questionnaire preparation, data analysis, drafting of reports, and similar tasks which are not directly related to fieldwork will have to be defined in terms of daily rates.

(B) Surveys, as defined in section 1.2.1.1., standard survey universe.

(B.1) Cost of surveys of up to 7 demographic questions and up to 15 question units per 250 respondents. Question units are calculated according to the definitions in annex section 3.5. The quotes must include all costs that will incur for the fieldwork, in particular:

- For CAPI surveys: Travel cost of interviewers
- For CATI surveys: Cost of the telephone or video conference system
- For CAWI surveys: Cost of the online survey tool

(B.2) Cost of one additional question unit per 250 respondents.

The price must include sampling, the recruitment of respondents, the cost of the survey interviewer, conduct of the survey including travel cost of the survey interviewer, cost for technical equipment and software needed to record answers, and any other cost that the national contractor will impose. The tenderer must be able to slice the number of survey participants in partitions of 50 (for example, allow to order 250, 300, 350, or 400 respondents for any given country).

If the appointing EU body exceptionally requests sampling from a non-standard survey universe, the following price increases will be accepted in the reopening competition:

- A sub-group of the general public (natural persons) defined by more than 2 (two) socio-economic characteristics: up to 25% (for example, if the successful tenderer offers CATI surveys in Austria for a price of EUR 1,200, a price increase of 25% x 1200 = 300, i.e. a final price of up to EUR 1,500 will be accepted).
- Companies defined by certain characteristics (e.g. number of employees, turnover or NACE sector): up to 150% (for example, if the successful tenderer offers CATI surveys in Austria

for a price of EUR 1,200, a price increase of 150% x 1,200 = 1,800, i.e. a final price of up to EUR 3,000 will be accepted.

If the appointing EU body requests oversampling, a price increase of up to 25% in the reopening competition will be accepted.

(C) Interviews, as defined in section 1.2.1.2: Cost of conducting an interview with 1 to 2 participants.

(C.1) Face-to-face, first 60 minutes: Cost must include the cost of the interviewer and the transcription of the interview. Travel costs of the interviewer are reimbursed according to definitions in section 1.3 and should therefore not be included in this price.

(C.2) Telephone / online, first 60 minutes: Cost must include the cost of the interviewer, the transcription of the interview, and the cost of the telephone or video conference system.

(C.3) Face-to-face, additional 30 minutes.

(C.4) Telephone / online, additional 30 minutes.

(D) Focus groups and social experiments, as defined in section 1.2.1.3: Cost of conducting and transcribing a focus group discussion or social experiment with up to 12 participants.

(D.1) Face-to-face, first 60 minutes: Cost must include the cost of the researcher, the cost for recruiting up to 12 participants, and the transcription of the discussion / experiment. Travel costs of the researcher are reimbursed according to definitions in section 1.3 and should therefore not be included in this price.

(D.2) Telephone / online, first 60 minutes: Cost must include the cost of the, the cost for recruiting up to 12 participants, and the transcription of the discussion / experiment.

(D.3) Face-to-face, additional 30 minutes.

(D.4) Telephone / online, additional 30 minutes.

(E) Translations: The cost for translating 100 words of written English text into each of the specified languages. The cost must include a revision round, that is, the initial translations may be reviewed by national experts and possible adjustments to the translated text must be done without additional charges.

(F) Online surveys and interviews, as defined in section 1.2.1.4.

- Cost of a survey with 15 question units, cost for each additional question unit. A single survey can include up to 50 participants.
- Cost per interview of 60 minutes, cost for additional 30 minutes.

For (B), (C) and (D), cost for non-mandatory countries must only be specified if the tenderer offers these in their technical offer.

Calculation of the price for price award criterion

The price of the price award criterion will be calculated based on the following service orders. The weighting reflects the expected volume of orders throughout the contracting period. The sum of weighted prices establishes the offer price.

#	Order	Weight
1	CAPI Survey	10%
2	CATI Survey	25%
3	CAWI Survey	25%
4	Interview face-to-face	5%
5	Interview telephone / online	10%
6	Focus group / social experiment face-to-face	5%
7	Focus group / social experiment telephone / online	10%
8	Online surveys and interviews	10%

The exact composition of each item is visible in the financial offer template.

3.2.2. Financial offer template: Lot 2

Tenderers are requested to fill the sheet "Lot 2".

(A) Cost of the research team

Tenderers are requested to specify a daily rate for each role within the research team.

(B) Cost for literature reviews

Up to 25 publications: The cost should include the cost of defining relevant search terms, the cost of performing the literature search including any licensing costs for accessing relevant literature databases, the cost for accessing literature

Calculation of the price for price award criterion

(A) Cost of the research team	70%
(B) Cost for literature reviews	30%

3.2.3. Financial offer template: Lot 3

Tenderers are requested to fill the sheet "Lot 3".

As defined in the technical specifications, the financial offer for flash polls shall include one fixed part ("annual fee"), which is paid regardless of the actual number of flash polls ordered, and a variable part ("order fee" ,"country fees" and "translations").

(A) Annual fee

The annual fee shall cover all costs that incur to the contractor for maintaining consumer panels, maintaining business relationships with their sub-contractors, and organising kick-off and other administrative meetings with the appointing EU body, and similar expenses.

The annual fee shall depend on the maximum number of individual polls per country that can be exercised of the period of one year.

- Up to 90 polls
- Up to 180 polls
- Up to 270 polls

Example: The appointing EU body purchases the option to conduct up to 90 polls for one year. This option could be exercised in any of the following ways:

- Order nine times a flash poll for Germany, Italy, France, Spain, Poland, the Netherlands, Greece, Romania, Belgium and Czechia (9 x 10 = 90)
- Order three times a flash polls for all countries in group I, II and III (3 x 29 = 87)
- Order five flash polls for Germany, Italy, France and Spain and ten flash polls for Poland, the Netherlands, Greece, Romania, Belgium and Czechia (5 x 4 + 10 x 6 = 80)
- Any other combination that results in 90 or less polls.

(B) Order fee

The order fee will be paid for ordering one survey to be conducted in either one or many countries. The order fee shall include

- Standard order fee
- Reduced order fee: A reduced order fee shall be applied when the same questionnaire is used again or only slightly modified. A survey shall be considered as only "slightly modified" if no more than 20% of questions have been changed, replaced or added.

(C) Country fees

- Cost of conducting a flash poll in a single country of 1 – 10 question units, per 100 respondents.

(D) Translations

- Cost of translating 100 words of English text.
- The price must include one revision round

Calculation of the price for price award criterion

Item	Percentage of total cost
(A) Annual fee	30%
(B) Order fee	20%
(C) Country fees	40% overall: • The average of all countries in Country group I 40% (16% overall) • Country group II 30% (12% overall) • The price of the 10 countries with the highest price in Country group III 30% (12% overall) Country group IV will not be considered for the price award criterion, but any price in country group IV cannot be higher than the highest price in country group I, III and III.
(D) Translations	10%

3.2.4. Financial offer template: Lot 4

Tenderers are requested to fill the sheet "Lot 4".

Cost of the research team: Tenderers are requested to specify a daily rate for each role within the research team.

Travel costs for work at the appointing EU body's premises should not be included in the daily rate, as per point 1.3 of these tender specifications.

3.3. DRAFT CONTRACT

The contract which results from this procurement procedure will be based on the model uploaded in e-Tendering with all other procurement documents.

3.4. CASE STUDIES

3.4.1. Case study for Lot 1

Regulation (EU) 2019/1381 of the European Parliament and of the Council of 20 June 2019 on the transparency and sustainability of the EU risk assessment in the food chain[17] introduces new provisions for risk communication in the EU food safety system. Among others, it establishes taking into account risk perceptions of all interested parties as a general principle of risk communication.

EFSA covers a broad remit of topics, including animal health and welfare, pesticides, nutrition and others. Risk perceptions in these areas differ and so do interested parties; this in turn requires different approaches to engagement and communication along the risk assessment process.

We would be interested to see:

- How would you approach a study on risk perceptions in one of the areas of EFSA's work, namely animal welfare? Which interested parties would you consider for targeted social research? Please summarize your rationale, along with decisions whether quantitative methods (e.g. surveys) or qualitative methods (e.g. focus groups) would be more adequate to explore risk perceptions of these groups (max 1000 words)

- Examples of survey questions you would ask in relation to the topic (max 3 questions for a target group of your choice)

3.4.2. Case study for Lot 2

Modern technology makes it possible to alter genetic material to create novel traits in plants, animals, bacteria and fungi. This technology has primarily been used in crops to increase insect resistance and herbicide tolerance, and in micro-organisms to produce enzymes. Organisms that have had their genetic material altered this way are called genetically modified organisms (GMOs). Food and feed containing or consisting of GMOs or produced from GMOs are known as genetically modified (GM) food and feed.

The use of genetically modified organisms (GMOs) is a topic which has spun an intense debate about risk perception since their introduction in the 1970s. Since the 1990s, the debate about the use of GMOs is mainly cantered on crops and food products, whereas GMOs in pharmaceuticals have gained broader acceptance.

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[17] See more here

In the context of EFSA's work, the Authority has the mandate to communicate on its risk assessments, including in the area of GMOs. In order to do so, it is important for EFSA to take into account risk perceptions of all interested parties.

We would be interested to see:

- How would you approach a literature review that seeks to understand factors underlying consumer perception of GMOs? What search criteria would you use that would be of most relevance to EFSA? Based on these criteria, list at least 5 academic papers which you feel would be of most relevance to EFSA, adding a short synopsis of the paper and a description of the reason why you deem it relevant (suggestion: maximum 1000 words)

- How would you conduct a discourse analysis of the European Parliament which covers the topic of GMOs during 2020? Please explain the methods and tools you would propose to use, as well as specific aspects of the Parliament's work you would focus on. Elaborate your approach (suggestion: maximum 750 words)

3.4.3. Case study for Lot 4

Tenderers are requested to propose an initial plan for setting up a framework to collect and prioritize improvement recommendations across EFSA's public websites, based on research on users' needs and behaviours.

Background

EFSA communicates to and engages with its customers and with the public through a variety of digital platforms: its main corporate website18, the EFSA Journal19, OpenEfsa20, EFSA Connect21, Youtube, Twitter, among others.

Changes and improvements to the design, features, and content of these sites are mostly driven by internal decisions, without a structured way to capture users' needs (more below, under constrains).

Through this project, we want to improve how we can capture users' needs, monitor their satisfaction, and prioritize improvements accordingly.

Project goals – medium/long term

[18] www.efsa.europa.eu

[19] efsa.onlinelibrary.wiley.com

[20] open.efsa.europa.eu, replacing the old registerofquestions.efsa.europa.eu

[21] connect.efsa.europa.eu

This project has these main goals:

a) Develop a standardized approach to gather and process users' insights across EFSA's different digital channels.
b) Develop and implement an approach to categorise and prioritise improvements recommendation based on the analysis of users' needs
c) Help improving the usability of each platform, ultimately making it easier for users to find what they are looking for.
d) Identify clear metrics to indicate how well the services are answering to the users' needs identified.
e) Develop an internal user research practice

Technical scenario and constraints

Currently EFSA is aware of the following limitations:

- Target user groups identified only in general terms, not particularly focusing to the context of digital products
- Limited collection of user feedback, mostly through generic customer satisfaction survey, bi-yearly web survey and through specific support channels (Ask EFSA, Ask APDESK ticketing systems). No standard system in place at the moment to process feedback and convert them into actionable insights
- No common analytics platform across products. The main website uses PiwikPro. Data from different sources is visualised through PowerBI dashboards.
- Limited content revision and basic archiving policies in place
- Various digital platforms are based on different technologies, and maintained by different teams in the organisation
- Lack of a horizontal user experience function that covers the whole family of digital products and related resources

Deliverables:

Based on the requested service and according to case study description above, the tenderer must provide the following:

A. high level plan for all phases of the project: indicate for each phase milestones, goals and objectives, approximate duration, and indicative resources allocation;
B. define more in detail the activities included in the initial phase of setup and initial research as part of the overall plan;
C. define more in detail the scope and focus areas in the overall plan - highlight which are the crucial areas where intervention is needed and for which of them is more profitable to focus on;
D. define the methodologies used across the overall plan (including the selection and recruitment of participants where relevant), and describe their rationale

Format suggestion: not more than 30 pages, in A4 format, font Times New Roman size 12 (approximately 20.000 words).

3.5. SURVEY QUESTIONS AND QUESTION-UNIT PRICES

Questionnaires can be composed of different types of questions. To account for differences in complexity between types, prices will be defined in question units, are calculated as follows.

3.5.1. Simple closed questions

Closed questions are questions for which one or several answers are requested from a pre-defined list of options. In simple closed questions, one item or statement is tested.

Simple closed questions account for **1 question unit.**

Example:

When you buy food, which of the following are the most important to you?	
Item	Answer
1	Your ethics and beliefs
2	Food safety (e.g. if there is a risk in eating this food)
3	Cost
4	Nutrient content
5	Taste
6	Where the food comes from
7	Other
8	Don’t know

- The number of items shall not exceed 10. If they do, each additional item shall account for 0.25 question units.
- Simple closed questions can be either single choice, multiple choice, or require the respondent to rank the items.

3.5.2. Complex closed questions

Closed questions are questions for which one or several answers are requested from a pre-defined list of options. In complex closed questions, several items or statements are tested.

Complex closed questions account for **1.5 question units**.

Example:

Please tell me to what extent you trust the following sources or not for information on food risks						
Items ↓	Options →	Totally trust	Tend to trust	Tend not to trust	Do not trust at all	Don't know
1	NGOs					
2	Celebrities					
3	Scientists					
4	EU institutions					
5	Farmers					

- The number of items shall not exceed 10.
- The number of options shall not exceed 10.
- Question units are calculated by the number of items times 0.5. In the above example, the question would therefore result in 5 x 0.5 = 2.5 question units.

3.5.3. Open-ended questions

Open-ended questions are questions for which no suggested answer is provided. Respondents have to provide an answer in their own words. With the order, a pre-coding system for the answers will be established and it is the responsibility of the interviewer (for CAPI and CATI) or the tenderer's research team (for CAWI) to code the answers.

Open-ended questions account for **1.5 question units**.

3.5.4. Filter questions and follow-up questions

Filter questions are questions that may be asked in order to direct the respondents to the appropriate subsequent question(s).

The first filter question will be counted as **1 question unit**. Regardless of the number of sub-groups concerned, provided they do not overlap, all follow-up questions together will be also counted as **1 question unit**.

Example:

To all respondents:

Q1) What is your main means of transport to get to work?	
1	By car
2	By foot
3	By bike

4	Other

Follow-up question to respondents who answered 1)

Q2a) Do you own a car? (Yes / No / Other)

Follow-up question to respondents who answered 2)

Q2b) How long does it take you to get to work? (Less than 15 minutes / 15 – 60 minutes / more than 60 minutes)

In this example, Q1 will be counted as one question unit and Q2a and Q2b will be counted together as one question unit.

3.5.5. Additional demographic / socio-economic questions

Additional demographic questions will account for **<u>0.5 question units</u>**.

<u>Example</u>:

How many children do you have?	
1	None
2	1
3	2
4	3
5	More than 3

3.5.6. Other types of questions

Question units for other types of questions not mentioned in this section shall be agreed upon when ordering the service, but in general may **<u>not be smaller than 0.5 question units and not larger than 2 question units</u>**, depending on complexity relative to simple closed questions.