15/05/2023

Invitation to Tender

SHARE Wave 10 in Slovenia 2022-2023

Survey of Health, Ageing and Retirement in Europe -
European Research Infrastructure Consortium
(SHARE-ERIC)

Table of Contents

1. INTRODUCTION 3
1.1 Introduction to SHARE-ERIC 3
1.2 Scope of the work 3
1.3 Indicative procedure timetable 3
2. INSTRUCTIONS ON HOW TO SUBMIT A TENDER 4
2.1 Presentation and submission of the tender 4
2.2 Communication concerning the tendering process 4
3. CONTENT OF THE TENDER 5
3.1 Items to address in the tender 5
3.1.1 Items regarding the implementation of the survey 5
3.2 Forms to be filled out, signed and stamped by the tenderer 6
3.2.1 Price Specification Document 6
3.2.2 Interviewer Description Document 6
3.2.4 Tenderer Identification Form 6
3.2.5 Self-declaration according to Directive 2014/24/EU 6
4. ASSESSMENT OF TENDER AND TENDERER 6
4.1 Exclusion criteria 7
4.2 Selection criteria SHARE Wave 10 7
5. SPECIFICATIONS AND DELIVERABLES 7
6. SHARE-ERIC PROCUREMENT RULES 8

Appendixes

I. Contract documents:

- Data Processing Agreement (including explanatory checklist)
- Data Collection Framework Contract
  - Task Orders for the survey stages
    - Field Rehearsal
    - Main Data Collection
  - Task Orders for the survey projects (if applicable)
    - Drop-off questionnaire (if applicable)

II. Forms to be filled out, signed and stamped by the tenderer:

- Price Specification Document
- Description of Technical and Organisational Measures
- Description of Interviewers for SHARE Wave 10
- Tenderer Identification Form
- Self-Declaration

1. INTRODUCTION

1.1 Introduction to SHARE-ERIC

The Survey of Health, Ageing and Retirement in Europe (SHARE) is a multidisciplinary and cross-national panel database of micro data of individuals aged 50 and over. Investigating the relationships between health, economic position and social participation as people age is one of the most important research questions facing the policy community.

SHARE has the status as a European Research Infrastructure Consortium (ERIC). This gives it legal personality and capacity in all EU Member States and other partner countries of the ERIC as well as some of the tax exemptions (e.g. VAT) enjoyed by international treaty organisations and permits lean procurement procedures.

Since 2014 the seat of SHARE-ERIC has been in Munich, where its central coordination ("SHARE Coordination") has been located at the Munich Center for the Economics of Aging (MEA) as part of the Max Planck Institute for Social Law and Social Policy, Germany. From 2023 onwards, the SHARE Coordination will be located at the newly founded SHARE BERLIN Institute GmbH (SBI), while the SHARE-ERIC headquarters will remain in Munich.

1.2 Scope of the work

SHARE has previously collected nine waves of data, where most of the questions provided information about the circumstances of respondents' lives at the time of the interview or in their childhood. Due to the outbreak of the Corona virus in March 2020 all face-to-face interviews needed to be stopped and instead a Corona telephone survey was conducted. These necessary measures also had consequences on SHARE´s ninth wave, where a second Corona telephone survey was conducted.
SHARE's tenth wave shall tie again to earlier waves. It collects health variables (e.g. self-reported health, physical and cognitive functioning, use of health care facilities), psychological variables (e.g. well-being, life satisfaction, control beliefs), economic variables (e.g. work activity, income, retirement behaviour, wealth and consumption), social support variables, (e.g. family and social network, family support, intergenerational transfers of money and time). As in previous waves the questionnaire includes mainly closed questions as well as physical and mental health tests. The data will be available free of charge to the scientific research community.

1.3 Indicative procedure timetable

The indicative time table for the procurement process presented below is intended as a guide and, whilst SHARE-ERIC does not intend to depart from the timetable, it reserves the right for SHARE-ERIC to do so at any time.

Estimated date	Activity
25.05.2023	**Deadline for sending a request for clarification**
06.06.2023	Publishing of answers to the requested clarifications on the SHARE website
16.06.2023	**Deadline for submission of tenders**
07.07.2023	Notification of the award to be sent to the tenderers by SHARE-ERIC

2. INSTRUCTIONS ON HOW TO SUBMIT A TENDER

2.1 Presentation and submission of the tender

If you are interested in participating in this call for tenders, you are requested to submit your tender no later than

16.06.2023 23:59 CET

The tender must be drafted **in English.**

Please submit your tender **by email** to **procurement@share-eric.eu**

The subject of the email should contain the following information:

"Tender SHARE Wave 10"

Late delivery will lead to the exclusion from the award procedure for this contract. Non-respect for the above requirements regarding the presentation of the tender may lead to the exclusion from the award procedure for this contract.

2.2 Communication concerning the tendering process

All communications concerning this call for tender, including requests for clarification, must be made in writing to the following e-mail address: **procurement@share-eric.eu.** Clarifications by SHARE-ERIC to all questions will be communicated on the SHARE website (http://www.share-project.org/organisation/procurement.html).

Please note that SHARE-ERIC will not enter into a detailed discussion on the requested services at this stage.

The closing date for clarifications concerning this call for tenders shall be

25.05.2023

Questions or requests for clarifications sent to SHARE-ERIC after this deadline cannot be considered.

3. CONTENT OF THE TENDER

The tenderer has to submit a comprehensive tender, which comprises the following components:

3.1 Items to address in the tender

3.1.1 Items regarding the implementation of the survey

The tender should include:

- an estimation of retention rates which the tenderer considers achievable for the panel sample
- an estimation of response rates which the tenderer considers achievable for the refreshment sample (only if applicable)
- a description of the program of panel maintenance the tenderer has in place, including:
  - procedures to achieve the proposed retention rate of panel households and respondents
  - procedures to achieve the proposed response rate in the refreshment sample (only if applicable)
  - procedures to achieve a sufficient representation of the most difficult to reach or to convince respondent groups
  - procedures to motivate refreshment households, during the first wave, to further participate in future waves (only if applicable)
  - procedures to implement panel care (keeping in touch with respondents between waves, keeping track of changes in contact information (address, telephone number, e-mail address etc.) and keeping the alive/death status of respondents up to date)
- a demonstration of the tenderers experience in conducting internationally harmonized studies, referring to other cross-national projects the tenderer has conducted

Evidence from accomplishments of previous projects the tenderer has conducted that are comparable to SHARE should be included for each of the points mentioned above.

3.2 Forms to be filled out, signed and stamped by the tenderer

3.2.1 Price Specification Document

The *Price Specification Document* must be drawn up using the provided form. It needs to be stamped and signed by an authorized representative of the tenderer. Please make sure to check that all sums are displayed correctly before submitting!

3.2.2 Interviewer Description Document

The *Interviewer Description Document* must be drawn up using the provided form. It needs to be stamped and signed by an authorized representative of the tenderer.

3.2.3 Description of Technical and Organisational Measures

The *Description of the Technical and Organisational Measures* must be drawn up using the provided form. In case the tenderer is successful, this form will become part of the contract as Appendix to the Data Processing Agreement.

3.2.4 Tenderer Identification Form

An authorized representative of the tenderer, who will also sign the contract, must fill in and sign the *Tenderer Identification Form.* It will be considered as the signature of the tender, binding the tenderer to the terms included in the tender.

The tenderer shall provide a statement confirming the period of validity of its tender of ninety (90) days from the deadline for submission of offers in the *Tenderer Identification Form.*

3.2.5 Self-declaration according to Directive 2014/24/EU

Tenderers submitting duly complete, dated and sign the self-declaration in connection with the exclusion criteria listed in article 57 of Directive 2014/24/EU.

4. ASSESSMENT OF TENDER AND TENDERER

The assessment of tenderers and tenders will be done in accordance with the following steps:

(1) Verification that the tenderer is not in one of the situations covered by the exclusion criteria listed in Article 57 of the Directive 2014/24/EU.

(2) Assessment of the tender on the basis of the selection criteria

4.1 Exclusion criteria

Tenderers shall fill in the self-declaration according to Article 57 of the Directive 2014/24/EU.

In addition to the submission the tenderer undertakes to inform SHARE-ERIC without delay of any changes to his situation in this regard.

Tenderers may be excluded from participation in the present procurement procedure if they are found to be in one of the situations for exclusions.

4.2 Selection criteria SHARE Wave 10

The selection criteria below will be used for the evaluation of tenders submitted. The contract shall be awarded to the tenderer who has submitted the tender representing the best-value-for-money according to the following criteria.

Selection criterion	Maximum score/weighting
Information value, comprehensiveness and consistency of the documents provided as part of the tender, in particular also concerning the description of the Technical and Organisational Measures according to GDPR.	**22%**
Size and management of face-to-face interviewer network.	**20%**
Proof of successful history with international, longitudinal survey projects having scientific standards.	**20%**
Price.	**18%**
Number of requested changes to harmonised model contract.	**20%**
Total score	**100%**

5. SPECIFICATIONS AND DELIVERABLES

Specifications and deliverables are set out in the Task Orders.

6. SHARE-ERIC PROCUREMENT RULES

General provisions

Article 1 Scope of application

(1) The following provisions shall be applied to all tenders for survey research and survey development services.
(2) Survey research and survey development services include those research and development services that are necessary to maintain and advance the state of the art in survey technology. They include, but are not confined to, the development of survey software, research on survey methodology, and the development of innovative interview techniques and their application in the field.

Article 2 Principles

SHARE-ERIC shall treat procurement candidates and tenderers equally and without discrimination, regardless whether or not they are based within the European Union. SHARE-ERIC procurement policy shall respect the principles of transparency, non-discrimination and competition.

Article 3 Information on forthcoming procurement

The description of the services to be procured shall be made publicly available in a contract notice before the beginning of the procurement process. In such notice the objective and non-discriminatory criteria or rules SHARE-ERIC intends to apply, the minimum number of candidates to invite and where appropriate the maximum number shall be indicated.

Article 4 Language

All tender documents and ancillary correspondence shall be formulated in English.

Article 5 Currency

As a general rule the SHARE-ERIC shall ask suppliers to submit tender quotes in EUR.

Conduct of the procurement

Article 9 Grounds of exclusion

SHARE-ERIC may treat as ineligible and may not invite a supplier to tender or award a contract to a supplier if SHARE-ERIC has actual knowledge that the supplier has been convicted for any of the reasons listed under Art. 57 of Directive 2014/24/EU.

Article 10 Selection Criteria

SHARE-ERIC may establish selection criteria for the qualitative selection of suppliers to be invited to tender or, where applicable, to negotiate the contract.

Article 11 Award Criteria

SHARE-ERIC shall award contracts on the basis of best-value-for money, which shall be assessed on the basis of objective criteria in accordance with the principles set out in Article 2.

Article 12 Confidentiality

(1) In its communications with suppliers or tenderers or any third party, the SHARE-ERIC shall not disclose any information if the non-disclosure of such information is necessary for the protection of essential interests of SHARE-ERIC.

(2) SHARE-ERIC shall not disclose information communicated to it by a supplier or a tenderer that has been reasonably designated by that supplier or tenderer as confidential.

(3) The supplier or tenderer must maintain confidentiality about all official matters disclosed to him during his/her activity for SHARE-ERIC, even after termination of the tendering procedure. The specifications shall only be used to prepare an offer. Any further publication (even extracts) or disclosure is not allowed without explicit permission of SHARE-ERIC.

Article 13 Notice of decision to reject a tenderer or to award a contract

SHARE-ERIC shall send a notice to tenderers who failed to meet the exclusion or selection criteria pursuant to Article 9 and 10. The notice shall be sent as soon as possible after a decision has been made and include the reasons why the tenderer was unsuccessful in meeting those criteria.

Article 14 Cancellation of a procurement procedure

(1) SHARE-ERIC may decide to cancel a procurement procedure at any time before entering into a contract, provided such decision is motivated by objective reasons and in conformity with the principles set out in Article 2. Such an objective reason might be that there is no funding available for the upcoming wave.

(2) SHARE-ERIC shall inform all tenderers of its decision within a reasonable time.

(3) Participation in a tender procedure that has been cancelled shall not give rise to any compensation claims for foregone profits or costs incurred by suppliers or tenderers.

Contract Performance

Article 15 Contract Conditions

SHARE-ERIC may require compliance with obligations in the field of social and employment law that apply at the place where the works are executed or the services provided in addition to obligations resulting from laws, regulations, decrees and decisions applicable in the relevant State.

Article 16 Amendments to contracts during their term

(1) Contracts may not be modified during their term unless one of the following conditions are fulfilled:

a) the modification is not substantial;

b) the modification has been provided for in the initial tender documents and is included in the final contract by way of a clear, precise and unequivocal review or option clause;

c) the modification has become necessary due to unforeseen and urgent reasons related to health-related, economic or technical reasons and the replacement of the contractor would result in significant increase of costs or substantial delays to SHARE-ERIC.

Appeal Procedure

Article 17 Right of appeal

(1) Subject to paragraph (2) any supplier or tenderer who suffered or risks suffering loss or damage due to breach of these rules, may appeal a procurement decision taken by SHARE-ERIC.

(2) Appeals must be submitted in writing to SHARE-ERIC within ten days from the day on which the person submitting the appeal knew or ought to have known of the grounds for the appeal.

Article 18 Handling of appeals

(1) In case of an appeal the Managing Director of SHARE-ERIC shall appoint a Tenders Appeal board, composed of at least three competent members of SHARE Coordination staff.

(2) The Tenders Appeal Board shall notify the appellant in writing of its final decision within 30 working days following the date of receipt of the appeal.

Article 19 Jurisdiction

The Arbitration Court of the Munich Chamber of Commerce shall have the exclusive jurisdiction over any dispute between SHARE-ERIC and a supplier.