



BUILDING THE EUROPEAN OPEN SCIENCE OBSERVATORY

OPEN CALL FOR SUBCONTRACTORS

OpenAIRE is looking for a subcontractor to support us in implementing EOSC Track, which will develop and operate the European Open Science Observatory, a policy intelligence tool that will monitor policies, investments, digital research outputs, skills and infrastructure.

Application deadline: April 19, 2024, 17:00 CEST

For more information, please contact: tereza.simova@openaire.eu



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Table of Contents

Abbreviations	3
1. Scope and Description of the Open Call for Subcontracting	4
1.1. EOSC Track Background and Objectives	4
1.2. Open Call Objectives.....	5
1.3. Open Call Tasks.....	6
2. Evaluation and Award.....	9
2.1. Eligibility Criteria	9
2.2. Award Criteria	10
2.2.1. Award Criteria Description.....	10
2.3. Evaluation Procedure	12
3. Form and Content of Open Call Proposal	13
3.1. How to Join	13
3.2. Supplementary Information.....	15
3.2.1. Open Call Timeline.....	15
3.2.2. Payment.....	15
3.2.3. Supportive Materials	15
3.2.4. Practical Principles of Open Call.....	16
4. List of Annexes	19

Abbreviations

CV	Curriculum vitae
D	Deliverable
DMP	Data Management Plan
EC	European Commission
EOSC	European Open Science Cloud
EOSC A	European Open Science Cloud Association
EOSC SB	European Open Science Cloud Steering Board
EOSC Observatory	European Open Science Cloud Observatory
ESFRI	European Strategy Forum on Research Infrastructures
EU	European Union
FAIR principles	Findability, Accessibility, Interoperability, and Reusability principles
FAQ	Frequently Asked Questions
LIBER	Association of European Research Libraries
M	Month
ML	Machine Learning
NO	Number
NLP	Natural Language Processing
NOAD	National Open Access Desks
OA	Open Access
OECD	Organisation for Economic Cooperation and Development
ORE	Open Research Europe
OS	Open Science
PathOS	Open Science Impact Pathways
UNESCO	United Nations Educational, Scientific and Cultural Organization
VAT	Value Added Tax
WP	Work Package

1. Scope and Description of the Open Call for Subcontracting

OpenAIRE is looking for a subcontractor to support the implementation of EOSC Track, which will develop and operate the European Open Science Observatory. This policy intelligence tool will monitor policies, investments, digital research outputs, skills and infrastructure. EOSC Track's mission is to simplify and streamline monitoring in the European Open Science ecosystem, to bring a common understanding of collecting and interpreting data appropriate for monitoring, and to assist policymakers and research executives across Europe in understanding, shaping and aligning policies and implementation.

1.1. EOSC Track Background and Objectives

Open Science revolutionises science practices, making monitoring crucial for learning and strategic decision-making. The EU is implementing Open Science as its top priority, with Member States and Associated Countries representatives focusing on EOSC. Building trust within the EOSC is essential for fostering community engagement and empowerment. The EOSC Observatory, developed in the EOSC Future project, provides insights to the EOSC SB and the EC on the Open Science landscape, dynamics among actors, and future opportunities.

The [Open Science Observatory](#) aims to become an all-inclusive policy intelligence tool for policymakers, providing valuable insights into the implementation, adoption, and impact of Open Science and associated policies. This will involve increasing stakeholder representation, improving usability, harmonising monitoring frameworks, and disseminating policy and implementation best practices.

EOSC Track will develop the 2nd phase of the [EOSC Observatory](#), to make it an all-inclusive, one-stop-shop policy intelligence tool for policymakers to support decision-making at EU and national levels by providing valuable insights into the implementation, adoption, and impact of Open Science and associated policies. It will do so by:

- Increasing the representation of stakeholders contributing data to encompass the complete range of capabilities offered by the EOSC Partnership.
- Improving usability and thus adoption regarding data ingestion, indicators, and visualisations.
- Harmonising monitoring frameworks and ensuring a comprehensive understanding of indicators, as well as the methods for collecting and interpreting data.
- Enhancing the dissemination of policy and implementation best practises through the sharing of information, thereby cultivating a pervasive learning environment.

1.2. Open Call Objectives

This Open Call focuses on coordinating monitoring frameworks and activities, facilitating the implementation of surveys conducted by the EOSC SB, and ensuring timely data and content delivery on the platform through the active involvement of the EOSC bodies and community.

More specifically, the subcontractor will:

- Consolidate the monitoring framework for the EOSC-SB, embedding automated responses from data sources where possible and enhancing with new indicators for impact.
- Support the annual cycles of the EOSC-SB surveys.
- Support the EOSC-A in using the platform for its surveys.
- Interact with EOSC bodies and the community to gather impact & best practice stories.

Open Call is designed to select the **best single subcontractor that offers the best value for money.**

1.3. Open Call Tasks

This Open Call is structured into several tasks, each designed to address key challenges of the project's overarching objectives. Each task is accompanied by a table stating deliverables and the delivery date.

Task 1 - Support the alignment of surveys and EU Open Science monitoring initiatives

This task requires a deep dive into existing monitoring frameworks to identify and consolidate indicators that track the **effectiveness** and **impact** of Open Science initiatives. The subcontractor will:

- Compile a **brief inventory of indicators** to address the alignment by identifying commonalities, consolidating existing indicators, determining what works and what does not, and comparing qualitative vs. quantitative methodologies.
- **Propose innovative impact indicators**, integrating insights from projects like [PathOS](#), and develop composite indicators or visualisations that can better capture the context and nuances of Open Science practices.
- **Compile and publish a detailed and in-depth report outlining the indicators** in use across various initiatives, explaining what each indicator measures, the methodologies for data collection, and their application. Part of the report will be a **guideline** to member states and associated countries on collecting and interpreting data effectively to standardise and improve data quality in all areas of Open Science.

DELIVERABLES:

No	Name and short description	Delivery Date
D1	Monitoring Alignment Report and Guidelines Report that lists other monitoring frameworks for OS, overlaps, and gaps, including Guidelines on how to collect/interpret data.	June 15, 2024

Task 2 – Support EOSC SB survey cycle and analysis

This comprehensive task is central to understanding the progress and impact of the EOSC Track initiatives. This task will assist the EOSC SB in consolidating, filling out and analysing the surveys over 3 annual cycles. The subcontractor is tasked with:

- **Updating the EOSC SB survey** to reflect the latest developments in the framework and indicators (following D1), ensuring the study remains relevant and insightful (in cooperation with the OpenAIRE team). For reference, see the previous Survey on National Contributions to EOSC ([2022](#), [2021](#))
- Implementing these **updates in the survey platform** (in the EOSC Observatory), utilising the backend administrator tools for seamless integration (in cooperation with the OpenAIRE team).

- **Developing and disseminating tutorials, guides, and FAQs** to ensure a uniform understanding of the survey questions, promoting consistency in responses across the board.
- **Managing inquiries from EOSC SB members** efficiently providing timely and helpful responses to facilitate their participation in the survey process.
- **Compiling the collected survey data into a detailed annual report.** This report will analyse the survey findings and integrate information from the EOSC-A survey, compile impactful stories and best practices, present narrative accounts from various countries, and include quantitative data from the OpenAIRE Open Science Observatory. This holistic approach aims to provide a rich, in-depth analysis of the state of Open Science, highlighting successes, identifying tasks, and suggesting actionable insights for future improvements. This report should thus not only reveal the situation in to member states and associated countries, but also the underlying causes of this situation, in order to identify the key enablers that are accelerating or slowing down the implementation of Open Science.
- Ensuring all compiled **data adheres to FAIR principles** (Findable, Accessible, Interoperable, and Reusable) and is published on [Zenodo](#), following the EOSC Track Data Management Plan, to promote transparency and accessibility.

DELIVERABLES:

No	Name and short description	Delivery Date
D2	Annual Analysis Reports 1 Annual report, a synthesis of OpenAIRE Open Science Observatory data and content.	July 15, 2024
D3	Annual Analysis Reports 2 Annual report, a synthesis of OpenAIRE Open Science Observatory data and content.	June 30, 2025
D4	Annual Analysis Reports 3 Annual report, a synthesis of OpenAIRE Open Science Observatory data and content.	August 30, 2026

Task 3 – Exploitation and Dissemination

This task aims to maximise the impact and visibility of the project's outcomes. The subcontractor will:

- **Present the findings and insights from the project at various high-profile forums**, including EOSC SB meetings, the EOSC Symposium, OSFair, UNESCO WG meetings, etc., to share knowledge and stimulate discussion.
- Organise and deliver up to four **webinars annually**, tailored to the needs and interests of EOSC SB members, to facilitate knowledge sharing and engagement.
- Co-organise a series of **sustainability workshops** in collaboration with EOSC SB, EOSC-A, and the EC, designed to engage stakeholders, promote the adoption of project outputs, and explore opportunities for sustainability beyond the project lifecycle. Participation in these events is not just about dissemination but also about gathering feedback, fostering collaborations, and ensuring the project's outcomes are aligned with the broader goals of the Open Science community.

DELIVERABLES:

No	Name and short description	Delivery date
D5	Sustainability workshop A sustainability workshop to devise strategies for a project's long-term impact and viability, focusing on key sustainability principles.	March 31, 2025
D6	Sustainability workshop A sustainability workshop to devise strategies for a project's long-term impact and viability, focusing on key sustainability principles.	September 30, 2025
D7	Sustainability workshop A sustainability workshop to devise strategies for a project's long-term impact and viability, focusing on key sustainability principles.	April 30, 2026
D8	Webinars for EOSC SB members Organising and delivering up to four webinars annually (overall deliver 12 webinars), tailored to the needs and interests of EOSC SB members, to facilitate knowledge sharing and engagement.	May 31, 2026

2. Evaluation and Award

The evaluation procedure for the Open Call is designed to ensure a rigorous, fair, and transparent assessment of all submissions, adhering strictly to the principles of non-discrimination and equal treatment. Following the submission deadline, tenders failing to meet the exclusion criteria will be promptly excluded from further consideration, ensuring that only compliant submissions are evaluated. The following sections describe the evaluation process, eligibility and award criteria.

2.1. Eligibility Criteria

Participation in the tendering procedure is open equally to all types of operators in EU member states and associated countries¹.

Subcontractors must indicate their legal status and submit appropriate proof (VAT registration number, registration number in a trade or professional register, copy of articles of association or incorporation, etc.) with the proposal. In cases of exemption from VAT or other exemption without entitlement to deduct VAT on inputs, subcontractors must state the reasons for exemption and provide evidence.

The price offer by contractors should therefore be explicitly within the range of the available budget (EUR 170 000), including vat (when applied).

Subcontractors cannot be in any exclusion situations listed under Article 57 of European Parliament and Council Directive [2014/24/EU](#), [2014/25/EU12](#) and [2009/81/EC](#). The subcontractors must submit a declaration of honour that it is not in one of the exclusion situations depending on their legal status – duly signed (see Annex 2 – Declaration of Honor).

Subcontractors must provide evidence of professional qualifications and experience (i.e. a portfolio of previous projects or contracts - at least two similar projects focusing on Open Science, demonstrating relevant experience, and CVs of key personnel indicating relevant experience). Subcontractors must describe their qualifications and experience in the project application (see Annex 1 – Proposal template).

Proposals must be submitted in English.

Subcontractors that do not comply with eligibility criteria will be excluded.

¹ https://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/3cpart/h2020-hi-list-ac_en.pdf

2.2. Award Criteria

The award criteria aim to evaluate tenders to select the best value for money. Tenders will be evaluated based on the following award criteria:

AWARD CRITERIA:

Award Criterion	Maximum Points
1. Price (max. 10 points)	
Total binding contract price for carrying out the work	10
2. Quality (max. 90 points)	
Description of the proposed solution	40
Clarity and comprehensiveness of the methodology	20
Interoperability and adaptability of the approach	10
Alignment with Open Science principles	10
Expertise and Experience in Open Science	20
Demonstrated knowledge and previous contributions to Open Science monitoring	10
Involvement in Open Science communities and networks	10
Implementation Plan and Feasibility	10
Realism and clarity of the timeline	5
Risk management and adaptability strategies	5
Engagement and Dissemination Strategy	10
Effectiveness of engagement with EOSC and Open Science communities	5
Clarity and reach of the dissemination strategy with KPIs	5
Sustainability and Impact	10
Long-term sustainability of project outcomes	5
Potential impact on advancing Open Science practices	5
Maximum total points	100

2.2.1. Award Criteria Description

The award criteria, with a heavier emphasis on quality (90%) over price (10%), are designed to identify the tender that offers the most economically advantageous proposal, taking into account the technical approach, methodology, expertise in Open Science, implementation plan, engagement strategy, and potential for sustainability and impact.

PRICE

The subcontractor will provide a financial proposal encompassing all aspects and requirements detailed in the tender specifications. This should include a complete cost breakdown to ensure full transparency and accountability of the proposed budget. The budget will be evaluated following the principle of best value for money (i.e. that costs must be reasonable and comply with the principle of sound financial management).

The **maximum budget should not exceed EUR 170 000** including vat (when applied). Tenders above this limit will not be taken into consideration. For the budget, use a format drafted in the submission template – see Annex 1.

QUALITY

Description of the Proposed Solution

The subcontractor will describe the proposed technical approach and methodology. The description should detail how the approach addresses project challenges and contributes to the overarching goals. Particular emphasis will be given on the description of the process of developing Annual analysis reports. The subcontractor needs to follow the general requirements of Horizon Europe projects (see Horizon Europe Programme Guide² and Annotated Grant Agreement³).

Expertise and Experience in Open Science

The subcontractor will showcase involvement and contributions to Open Science by describing previous projects or initiatives, especially in the Open Science monitoring. This includes detailing participation in Open Science communities, networks, or working groups, and demonstrating a commitment to Open Science's collaborative and inclusive ethos.

Implementation Plan and Feasibility

The subcontractor will present a realistic implementation plan, including timelines and resource allocation. The plan should outline risk management strategies and adaptability measures to ensure project success despite potential challenges.

Engagement and Dissemination Strategy

The subcontractor will outline the strategy for engaging with EOSC, Open Science communities, and other stakeholders. This should include a detailed dissemination plan for the project's findings and outputs to maximise reach and impact.

Sustainability and Impact

The subcontractor will describe the approach to ensuring the long-term sustainability of the project's outcomes and detailing the potential impact on advancing Open Science practices. Strategies for maintaining the relevance and accessibility of the project's outputs beyond its immediate lifespan should be included. The impact shall be demonstrated by using comparison results of the current indicators and monitoring against the solution suggested.

²https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/guidance/programme-guide_horizon_en.pdf

³https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/aga_en.pdf

2.3. Evaluation Procedure

The evaluation procedure for the Open Call is designed to ensure a rigorous, fair, and transparent assessment of all submissions, adhering strictly to the principles of non-discrimination and equal treatment. Following the submission deadline, tenders failing to meet the eligibility criteria will be promptly excluded from further consideration, ensuring that only compliant submissions are evaluated.

Three evaluators from OpenAIRE will evaluate each tender, chosen for their expertise and impartiality to uphold the evaluation's integrity.

Each tender will be assessed based on the predefined selection and award criteria. Tenders will be scored according to the maximum points allocated for each criterion. The evaluators will independently review and score the tenders, followed by a collective discussion to reconcile any significant discrepancies in scoring. The final ranking of tenders will be based on the aggregate scores, identifying the proposal that best meets the project's objectives and offers the best value for money.

3. Form and Content of Open Call Proposal

Only proposals that will be received by the deadline and those that adhere to the following requirements will be subjected to the evaluation of the eligibility criteria.

3.1. How to Join

STEP 1: READ ALL THE INFORMATION AVAILABLE ABOUT OPEN CALL

Familiarise yourself with the [EOSC Track project](#), the EOSC Track Open Call for Subcontractors, and the [EOSC Open Science Observatory](#), and see if you are an eligible candidate for subcontractors.

STEP 2: PREPARE YOUR SUBMISSION DOCUMENTS

You can join by submitting a proposal (given template – see Annex 1) of a maximum of seven pages. The proposal format must respect the given template (Open Sans font, ten font size text, pdf) and the following structure:

Title Page

- Add contact information and a summary of the proposed solution for Open Call.

Subcontractor´s Background and Experience

- **Company/Organization Profile:** A brief history and description of the tenderer's organisation, including size, location, and core business areas.
- **Relevant Experience:** Portfolio of previous projects similar to the scope of this tender, emphasising experience in Open Science and contributions to the EOSC or similar initiatives. Include information about staff, capabilities, and name key persona for this proposal (full CVs can be added in the appendices in a separate pdf).
- **Commitment to Open Science Principles:** Information about policies or guidelines developed or followed by the applicant promoting Open Science. Or/and examples of any outcome of contractors following the Open Science principles. Information on the tenderer's expertise and experience in Open Science, including involvement in communities, networks, or working groups, and contributions to the field.

Description of Proposed Solution

- A description of the proposed solution (technical approach and methodology) detailing how the project objectives will be achieved. This section should clearly articulate the innovative aspects of the approach, its adaptability to potential challenges, and its alignment with Open Science principles. Particular emphasis should be given to describing the process of developing Annual analysis reports

Implementation Plan and Feasibility

- **Project Plan:** A Gant diagram outlining the timelines for the project's implementation (including information about the deliverables, dissemination activities, and other important milestones).
- **Risk Management:** An analysis of potential risks and mitigation strategies.

Engagement and Dissemination Strategy

- A short description of the strategy for engaging with relevant stakeholders, including the EOSC, Open Science communities, and other.

Sustainability and Impact

- An outline of the approach to ensuring the sustainability of the project outcomes and the anticipated impact on advancing Open Science practices.

Financial Proposal

- A financial proposal that includes a breakdown of all costs associated with the project. This should cover personnel, materials, travel (if necessary), and any other relevant expenses.

Appendices

- Any additional documents that support the tender submission, such as:
 - proof of legal status,
 - signed Declaration of Honor,
 - detailed CVs of key personnel,
 - and any other relevant appendices.

STEP 3: SUBMIT THE TENDER

The tenders shall be **submitted electronically** (preferably in pdf) **to the following email address: tereza.simova@openaire.eu**. The **deadline for submission is April 19, 2024, 17:00 CET**. All tender proposals must be up to max. seven pages; does not include appendices specified in Step 2. OpenAIRE shall not consider late submission proposals to be valid. Once the tender is submitted, the applicant will receive a notification to verify the delivery of the application.

STEP 4: EVALUATION OF APPLICATIONS AND RESULTS ANNOUNCEMENT

Once the Open Call is closed, all submitted tenders will be evaluated (see 2.3 Evaluation Procedure). The results will then be communicated to the applicants by May 10, 2024, and then the contract signing process will begin with the winner.

3.2. Supplementary Information

3.2.1. Open Call Timeline

The Open Call will be open for applications from March 20, 2024, till April 19, 2024, 17:00 CET. Thereafter, the applications will be evaluated and communicated to the applicants by May 10, 2024, the results will be sent out and a contract will be signed with the winner of the open Call. The engagement is expected to start in May 2024 and end in November 2026.

3.2.2. Payment

Payments will be made in three instalments depending on the contractor's performance of the relevant stages of the works. The first payment of 20% of the contract value on signing the contract, the next payment of 30% of the contract value on completion of deliverables D1, D2, D5, D7 (June 2025) and the final payment of 50% on completion of D3, D4, D6, D8, D9, D10, D11 (November 2026). Travel and accommodation costs for the contractor attending project conferences or meetings with the secretariat must be include in the overall project budget.

3.2.3. Supportive Materials

Accompanying materials are available for applicants, in particular:

- [Open Science Observatory](#): collecting indicators and visualisations that help interested stakeholders (policymakers and research administrators, among others) better understand the Open Science landscape in Europe across countries.
- [OpenAIRE Service Catalogue](#): contains descriptions of all services provided by OpenAIRE.
- [OpenAIRE MONITOR](#): one of the largest open scholarly record collections worldwide, key in fostering Open Science and establishing its practices in the daily research activities.
- [UNESCO Recommendation on Open Science](#): recommended reporting practices for Open Science progress from UNESCO.
- [EOSC Observatory](#): a policy intelligence tool being developed by the EOSC Future project for monitoring policies, practices, and impacts related to the EOSC.
- [EOSC Observatory community on Zenodo](#): Repository of data sets, analysis and surveys on national contributions to EOSC.
- [PathOS](#): a project aiming to collect concrete evidence of Open Science effects, study the pathways of Open Science practices, from input to output, outcome and impact, and consider enabling factors and key barriers.
- [PathOS OS Indicator Handbook](#): covers various indicators measuring various aspects of Open Science, their academic, societal and economic impacts, and reproducibility.

3.2.4. Practical Principles of Open Call

OpenAIRE reserves the right to change the terms and conditions of the Open Call at any time. Subcontractor will be notified. The evaluation committee acts in good faith in granting the awards and reserves the right not to grant awards.

A consultation team from OpenAIRE will be available to answer any inquiries on different kind of matters. OpenAIRE will respond only to the contact person stated in the project proposal, by email, or 1-1 pre-arranged con-calls.

Subcontractors are the only responsible for the content and nature of their submission to the OpenAIRE Open Call. No rights can be derived from suggestions and instructions provided by OpenAIRE. Subcontractors are responsible for ensuring that no legal obligations, no rules of public order of decency and no rights of third parties are violated, according to the laws of the countries involved. They must also ensure that their submission results in no unlawful act and/or in no damage to others. Subcontractor will indemnify OpenAIRE from any and all costs and damages that could result from infringing their legal obligations. OpenAIRE shall not be liable in the event of loss of submitted proposals namely due to network interruptions. In case of any failures of the OpenAIRE system or website, contractors will have to contact the OpenAIRE support team via the helpdesk⁴.

The information which has been specifically designated as "confidential" by contractors shall remain confidential.

Intellectual Property

All Intellectual Property Rights from the Tender shall be transferred to OpenAIRE, including Copyright, Database Sui Generis Rights (SGDR), related rights, as well as any industrial rights arising from the Tender. In relation to Copyrights, related rights and SGDR, all economic rights are transferred to OpenAIRE, indicative but not exclusively, the right to reproduce, disseminate, publicly perform, communicating to the public, making available or creating derivative works of any protected subject matter produced under the tender. All Open Licensed material, including source code and relevant documentation, retain their original open licence and shall be deposited in publicly available open access repositories.

OpenAIRE reserves the right to use the projects selected and funded for publicity and promotion of the project via different media channels. The winning organisation should cooperate with OpenAIRE on publicity and communication and act as ambassadors for the infrastructure services.

⁴ <https://www.openaire.eu/helpdesk>

Data Protection

Personal data of the contractors shall be collected and processed only for the purpose of participation in the Open Call by the OpenAIRE team which takes all appropriate measures for the safety of subcontractors data and respond to all the requests regarding data subjects rights. The General Data Protection Regulation (2016/679/EU) and the Greek Law 4624/2019 guarantee that the processing of data is carried out in compliance with the fundamental rights and freedoms, as well as the dignity of the data subject with particular reference to confidentiality, personal identity and the right to data protection.

Subcontractors acknowledge that providing their personal data in the Appendices is mandatory in order to participate in the Open Call. Subcontractors allow OpenAIRE to disclose their name, as provided in the corresponding application form, in any form or by any means, for promotional purposes. Personal data shall be kept, under the scope of this program, until its completion after which they will be erased. Should there be any queries concerning the processing of personal data, these shall be addressed to OpenAIRE team.

Open Science Principles

Fully understanding that the uptake of EOSC-related services requires transparency, the subcontractor must follow current best practices to ensure Open Science is embedded in all aspects of the project. These include e.g.:

- Publish project outputs (reports, deliverables, slides, posters, training material, etc) in Zenodo. All outputs will be deposited as Open Access, except for deliverables explicitly marked as restricted, in which case they will be deposited as closed access (i.e., metadata publicly available but associated files not).
- Publish scientific publications via well-known practices respecting the Horizon Europe rules. As a minimum, publish in Green Open Access (self-archiving) deposited in Zenodo, use Open Research Europe (ORE) as an option.
- Commit to use open data sources where available, and open-source libraries for tools and services.
- Follow a quality assurance mechanism that will be shared with subcontractors afterwards. Ensure that documentation accompanies the respective code, supporting, among others reproducibility for metadata, metrics, and indicators. Use open repositories and tooling. Foster open collaboration by actively enrolling users in a co-design and evaluation processes.
- Follow OpenAIRE Guidelines⁵ when publishing results to ensure all artifacts are linked to each other, providing crosswalks between publication-data-code-algorithm-service.

⁵ <https://guidelines.openaire.eu/en/latest/>

- Follow Data Management Plan (will be shared with subcontractors afterward). Follow FAIR principles, standards and metadata, and well-established ontologies as stated in the Data Management Plan.
- All methods and codes developed in the project (including NLP/ML used in policy summarisation) will be fully documented presenting assumptions, biases and limitations. Code will be published in GitHub-Zenodo and linked to publications and data (survey dumps).

4. List of Annexes

ANNEX 1 – PROPOSAL TEMPLATE

ANNEX 2 – DECLARATION OF HONOR