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EUROPEAN COMMISSION
DIRECTORATE-GENERAL FOR COMMUNICATION

# Call for tenders EC-COMM/2024/OP/0830

# Operation of the Europe Direct Contact Centre (EDCC)

## Tender specifications

## Part 2: Technical specifications

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# 1 Services requested

## 1.1 Overview

Under this call for tender, the Directorate-General for Communication (thereafter: DG Communication) of the European Commission is seeking the services of a contractor who will operate the Europe Direct Contact Centre (thereafter: EDCC).

The purpose of the EDCC is to answer questions from citizens about the European Union.

The objective of the centre is to offer a reliable, high-quality and efficient information service for citizens in the European Union and beyond, thereby contributing to a better understanding of the functioning of the EU. The service is provided in all 24 EU official languages, Ukrainian and Russian[1], by telephone, e-mail and messenger apps (chat).

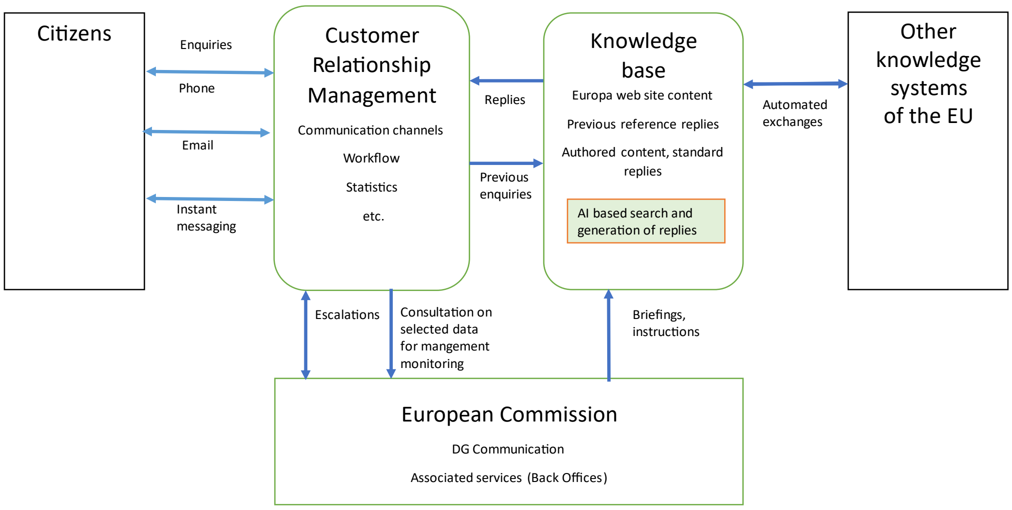
The services requested come in continuation of an already existing contact centre. Information on the existing EDCC can be found here:

- main webpage for contacting the EDCC: https://europa.eu/european-union/contact_en;
- annual activity reports: the 2023 report is enclosed as annex 2.

The operation of the EDCC is based on the main elements shown in the chart below and described in detail in this document.

An evaluation study of selected aspects of EDCC's activities has been published at: https://commission.europa.eu/document/download/9efda8ad-af4f-4e7f-ab15-871e72f45830_en?filename=Evaluation%20study%20of%20the%20future%20of%20the%20Europe%20Direct%20Contact%20Centre%20November%202024.pdf

Europe Direct Contact Centre – main elements




[1] In 2022, the EDCC started to offer its services in Ukrainian and Russian, to inform about the EU's response to the Russian aggression against Ukraine and support people fleeing the war. For the purposes of this contract, there are no differences in operations in any of the 26 EDCC languages. Information on EU official languages: https://european-union.europa.eu/principles-countries-history/languages_en.

**DG Communication** is in charge of the general management, overall monitoring and coordination of all aspects of the contact centre's work.

The **contractor** is responsible for the operations of the EDCC. This implies in particular that the contractor shall employ the necessary staff and provide a customer relationship management (CRM) IT system to run the communication channels with citizens, workflow management, statistics, reporting, etc.

The contractor shall also maintain a **knowledge base** that constitutes the source of information for the answers to the citizens' questions. It integrates the knowledge built by the EDCC with other knowledge systems of the Commission. This knowledge base is separate from the CRM system to allow for its development during the contract period and to ensure full transfer to the Commission at the end of the contract. The contractor must operate state-of-the-art AI tools, compliant with the applicable EU provisions, to support the work in the CRM system and in the knowledge base.

A number of **associated services** works with the EDCC. These are Directorates-General (thereafter: DGs) of the Commission or other EU institutions or bodies which have agreed with DG Communication to operate a back office in accordance with the principles set out in the internal 'EDCC charter' (enclosed as annex 3).

As a rule, the EDCC replies directly to as many enquiries as possible, but it can escalate a small share of complex or sensitive questions to the associated services, who also provide training and knowledge.

## 1.2 Role of DG Communication

DG Communication is responsible for the day-to-day contacts with the contact centre. Its main tasks are:

a. provide guidance and advice to the contractor, including the treatment of second-level enquiries (please see section 1.8) for which no specific back office exists;

b. supervise and monitor the implementation of the contractor's and contact centre's tasks;

c. coordinate the cooperation with associated EU services;

d. monitor the quality of the service, including ex-post quality control of samples of the replies provided by the contact centre;

e. supervise business continuity procedures;

f. organise promotional activities for the service.

## 1.3 Role of the contact centre

The contractor is responsible for:

a. receiving and managing citizens' requests, aiming to fulfil the objective of the contract;

b. recruiting and training the appropriate number of contact centre staff, to be able to meet the requirements according to the languages, subjects, and volumes of enquiries;

c. providing fast, accurate and high-quality replies to the first-level enquiries (see Section 1.7). Second-level enquiries are handled with the assistance of back offices according to guidelines provided by the ordering service;

d. maintaining the complete telecommunications and IT infrastructure necessary for the operation of all communication channels (e-mail, telephone and instant messaging apps).

e. keeping and maintaining two information management tools:

    i. an IT system for customer relations management (CRM), which must have e.g. a complete log system of all enquiries and answers and all steps in their handling, and must integrate all communication channels, manage workflows, allow monitoring and reporting, and other functions the contractor might wish to have. The CRM system must include state-of-the-art AI functions that help speed up the work;

f. a knowledge base, containing information to be used by staff when answering enquiries. The knowledge base interacts with other knowledge data systems of the Commission. The contractor creates the content and hosts the knowledge base. It must be possible to transfer the knowledge base in full to the Commission or other actors. The knowledge base must apply state-of-the-art artificial intelligence (AI) functions that help the staff find and present replies that are correct and understandable for citizens. It is, however, the human staff that checks and validates replies (see section 5.5.3) and all other tasks that can be considered as necessary to operate a contact centre.

## 1.4 Opening hours

The opening hours are:

- Monday to Friday, 09.00 to 18.00 Central European Time (CET);
- 255 days per year (with six closure days laid down in agreement with DG Communication).

During longer closure periods, information on the reopening time must be provided in the voice-mail message and in the automatic acknowledgement for e-mail enquiries. The contractor must ensure that service levels do not degrade after such closure periods.

DG Communication is entitled to request the contractor to open the contact centre up to three weekends per year at the regular service cost. The fourth and further weekends within each calendar year will be paid in accordance with the price list associated with this service.

Outside the opening hours mentioned above, the contractor is free to organise the work of the contact centre in a way to meet the expected service levels, keeping in mind the working hours of the Commission and other EU services where interactions with the back offices are needed.

## 1.5 Nature of enquiries

The contact centre provides accurate and fact-based information to citizens on any EU-related topic. The EU has extensive competences, and the content of the enquiries varies considerably. The required elements of an answer are described in section 1.6.

The contact centre does **not:**

a. file or forward complaints or participate in any formal administrative procedures (though it does inform citizens who they need to contact for this);

b. comment on EU policy and political issues or positions;

c. provide legal advice (interpreting EU laws);

d. reply to intermediaries, such as consultancy firms or law firms, who commercialise the information obtained.

The web page on Europa provides a summary for the public of the nature of enquiries answered by the contact centre: https://europa.eu/european-union/contact/europe-direct-answering-your-questions-about-eu_en.

Examples of enquiries can be found in the appendix at the end of this document .

### 1.5.1 Particular categories of enquiries

a. Enquiries that do **not concern the EU** are answered with a standard reply to that effect (‘out of scope’).

b. Enquiries that contain **spam**, abusiveness, commercial offers or similar are closed without reply ('obsolete').

c. Enquiries that only express **opinions** about the EU, without posing a question, are responded to with a standard 'thank you' reply.

d. The EDCC does not reply to questions from **journalists** but refers them to the competent press services.

e. If a citizen sends **multiple** identical or very similar messages to the EDCC, only the first of these messages is to be answered. The rest can be closed without answer ('obsolete').

f. If several citizens send **identical** or very similar messages to the EDCC, for example as part of an organised political campaign, all these messages are to be answered individually. However, upon decision by DG Communication in each case, such enquiries can be handled with a 'bulk reply' where identical replies are sent out to all enquiries.

g. If an enquiry contains a specific **security and terror threat** against the EU institutions or of other public interest, it must be identified immediately and forwarded to the Commission's security service for assessment and follow-up according to an urgent procedure.

h. Enquiries that concern **complaints** about the EDCC service must be escalated as a second-level enquiry to the DG Communication back office.

## 1.6 Relevance and accuracy of replies

The contractor must ensure that citizens receive correct, accurate and relevant answers, tailor-made for each enquiry. The different elements of information must be clearly presented in a logical order of priority. The reference to further sources of information must be relevant to the information needs the citizen expressed. Replies to enquiries shall:

a. be in the EDCC working language in which the enquiry was made;

b. be factually accurate;

c. be clear, concise and personalised;

d. show empathy when the citizen mentions a difficult personal situation;

e. include a reference to relevant official EU information and, where necessary as instructed by back offices, to national sources of information, along with links to relevant on-line sources;

f. cover all parts of the enquiry, but only answer what was asked;

g. include information and guidance on where the citizen can find further assistance, along with relevant contact details for national authorities in EU countries where necessary.

Written replies should be drafted in a clear and concise writing style, free from jargon and abbreviations. This requires the use of short sentences and active voice verbs that clearly identify the responsible subject.

The drafting guidelines for the EDCC are enclosed as annex 4. The guidelines are subject to change over time and the contractor must update their version to the new one as soon as it is issued by DG Communication.

## 1.7 First-level enquiries

The contact centre replies directly to as many enquiries as possible via any of the communication channels. The reply is always given in the language chosen by the citizen. It has to be one of the official languages of the EU, Ukrainian or Russian, and other languages that might in the future become working languages of the EDCC (see section 5.7).

The contractor must therefore employ staff who are able to understand the information provided by the Commission, as outlined in section 4 below, and adapt it to the specific question and language.

## 1.8 Second-level enquiries and back offices

### 1.8.1 Enquiries to be escalated to back offices

When an enquiry is **complex** or **sensitive**, the contact centre escalates it to the back office of the associated service that is competent on the topic. These are called 'second-level' enquiries.

An enquiry can be considered complex when the available official information sources are not applicable to the question. An enquiry can be considered sensitive when it concerns matters that are the subject of public controversy or dispute, particularly in times of crises.

Back offices give guidelines on this and can also decide that a certain type of enquiries should or should not be escalated for other reasons.

### 1.8.2 Role of back offices

The main characteristics of the cooperation with the back offices in the associated services are the following:

a. All existing agreements with associated services to operate back offices must be taken over by the start of the contract.

b. By January 2025, there were 37 back offices in associated services.

c. Each back office of the associated services covers a specific topic area. The back office in DG Communication covers corporate matters, all other topics not handled by the other back offices, as well as sensitive topics that require special attention.

d. All enquiries are considered as to be related to a certain back office, including first-level enquiries. This is determined by the topic classification to be applied to each enquiry upon receipt.

e. The back offices have these tasks:

    i. reply to the escalated enquiries;

    ii. provide standard replies and briefings, as well as training to the contact centre;

    iii. participate in the quality control.

f. The contractor must set up the technical connection to the EDCC CRM system for handling of second-level enquiries. That is, each back office must be given web-based access to the CRM system, enabling them to log in and receive and reply to escalated enquiries. Depending on the back-offices' needs, this access can be shared among multiple users.

g. Similarly, the back offices must have access to the knowledge base.

h. The contractor also provides reports and monitoring access for back offices for enquiries under their designated area of responsibility, as specified in section 3.

i. The contractor shall provide manuals to back offices on how to use the CRM system. The contractor shall also offer specific training courses on the use of the CRM system. This must be in place for all back offices by the start of the contract and on an ad-hoc basis during the contract period. Manuals must be available and training be held in English.

j. For each back office, the contractor shall appoint a supervisor to oversee the handling of enquiries related to a specific back office and to liaise with that back office.

### 1.8.3 Handling of second-level enquiries to back offices

The steps for handling second-level enquiries are as follows, regardless of the channel:

a. Transmission to the back offices takes place via an automated procedure to be set up by the contractor as part of the CRM system.

b. Telephone calls and instant messaging enquiries cannot be transferred directly. Instead, relevant details of the enquiry have to be noted, allowing for follow-up by written means.

c. All information exchanges with second-level support take place in English. When transferring an enquiry to a back office, the contact centre must:

    i. attach a summary in English;

    ii. transmit the results of research by the contact centre staff and, whenever possible, propose a reply.

d. Back offices will reply with instructions, information or a full draft of a reply. As soon as this is received, the contact centre staff prepare the final reply and transmit it (by e-mail, phone call-back or instant messaging) to the citizen in the preferred language.

e. In some cases, a back office may choose to send replies to second-level enquiries to citizens directly. In such cases the contact centre must ensure that the relevant information is recorded in the CRM system.

The CRM system must be able to track the escalations of second-level enquiries to back offices, for example to provide reports on unanswered escalations and handling time per back office.

The contact centre cooperates with DG Communication in the effort to support and motivate back offices in responding to escalations promptly and with high-quality replies.

## 1.9 Special associated services

Special associated services can be set up throughout the duration of the contract, responding to the need for special policy-related assistance. Special workflows can be put in place for such associated services which might include editorial guidelines for handling enquiries and/ or using API-type technical connections to communicate with the associated services. This will not diverge from the overall processes or operational philosophy of the EDCC.

At the date of the call for tenders, six such associated services exist and will need to be taken into consideration from the beginning of the service provision. The most important is the Research Enquiry Service described in point 1.9.1 below.

### 1.9.1 The Research Enquiry Service

The Research Enquiry Service is an associated service with specific requirements.

It provides answers to questions related to the EU Framework Programmes for research ‘Horizon Europe’ and to research matters in general. They are managed by the European Research Executive Agency (thereafter: REA). The main target group are citizens who have submitted or are planning to submit applications to participate in EU-funded research projects.

In 2023, 12 600 research-related enquiries were handled by the Research Enquiry Service.

Enquiries mainly arrive through a webform (see point 5.3.1 about webforms) but they may also be handled by telephone or instant messaging.

The service shall be provided exclusively in English.

**Workflow**

The contact centre shall filter all enquiries, respond to first-level enquiries directly and escalate second-level enquiries to the relevant back office.

Calls for proposals run under strict closure deadlines which are communicated in advance to the contact centre. In the run-up to these deadlines, the contact centre must prioritise the filtering, assigning and answering of all enquiries concerning the call-in question to ensure they are handled before the relevant call closure. The terms of the key performance indicators (KPI), however, continue to apply for all other enquiries. As a second priority, the contact centre shall handle enquiries posted by one of the national contact points (NCPs).

**Organisational matters**

The contact centre shall nominate a dedicated team headed by a supervisor who acts as a contact point for the REA back office. The supervisor shall be responsible for overseeing the service offered by the contact centre and for updating the knowledge base with the approval of the REA back office.

**Interactions with REA back office**

The REA back office:

a. maintains regular contact with the contact centre's supervisor;

b. shall be responsible for drafting and updating escalation guidelines (second-level enquiries) and providing background material and training to the contact centre’s staff;

c. shall organise briefings for the contact centre's staff on research-specific programmes.

**Reporting**

The contact centre shall provide daily, weekly, monthly, quarterly and annual statistical reports based on templates agreed with DG Communication and the REA back office.

All reports should be available online at any time. Reports for weeks, months, quarters and years shall be generated by aggregating the daily reporting data. Ad-hoc analytical reports shall be provided within 10 working days.

## 1.10 Communication channels

The contact centre should in general operate on an ‘omnichannel’ principle, allowing citizens to move effortlessly between different communication channels and receive a unified response to their queries.

### 1.10.1 Telephone calls

The steps for handling a first-level telephone enquiry are as follows:

1. Greet the caller.
2. Understand the question.
3. Search for elements for an answer in the knowledge base.
4. Confirm the caller's details.
5. Answer the question.
6. As part of the closure, invite the caller to reply to the satisfaction survey which must play in an Interactive Voice Response (IVR) system right after the end of the conversation.
7. If useful, hyperlinks to relevant websites or documents are sent by e-mail or instant text to the caller.
8. Enter relevant data in the CRM system, including a summary in English, and close.

In the course of the conversation, the communication officer may send an SMS (text message via the phone connection) with relevant links answering the citizen's enquiry. It should be clear for the citizen that the phone number used to send the SMS is a no-reply phone number.

### 1.10.2 E-mails

Enquiries in electronic format are received in the form of structured webform submissions.

The steps for handling a first-level enquiry by e-mail are as follows:

1. As soon as a request is received, an enquiry registration number is generated, and an acknowledgement of receipt is sent back to the enquirer. This automatic reply includes the enquiry registration number, a copy of the enquiry and information on the expected reply time.
2. The contact centre operator searches for the reply in the knowledge base.
3. The contact centre operator drafts and sends out the answer.
4. The e-mail sent to the citizen includes a standard footer, which includes, among other things, the user satisfaction survey and other messages decided by DG Communication, see section 5.3.2. The contact centre operator enters relevant data in the CRM system, including topic classification and a summary in English if the enquiry was in another language, and closes.

### 1.10.3 Instant messaging

The principles for handling enquiries by instant messaging apps are similar to those for handling phone calls. In addition, the methodology must include:

a. a standard greeting and introduction by the EDCC. This must include an explanation about data protection;

b. a step where the contact centre notifies the citizen that the session is closed and invites them to take part in a satisfaction survey;

c. a mechanism to automatically disconnect the session after a specified period of inactivity of the citizen, as agreed with DG Communication.

## 1.11 Volumes and forecast

The contractor must be in a position to handle all incoming enquiries in a way that fulfils the required key performance indicators (KPI) regarding quantity and quality, including those related to section 5.9. The response capacity of the service must be versatile and adaptable to current and future demand.

The EDCC currently handles approximately 170 000 enquiries per year. In 2023, the proportion by channel was 70% e-mail, 25% phone and 5% chat. Statistics on the volume of enquiries in the past and per language, country, communication channel and topic can be found in the annual reports mentioned in section 1.1.

Forecasting the number of enquiries is requested to determine whether and which measures (staffing, training, organisation, infrastructure, etc.) are needed to adapt to and prepare for fluctuations. The contractor will present to and align with DG Communication forecasts via a rolling forecast methodology, accompanied by the proposed measures to accommodate any expected fluctuations.

The contractor must present in an administrative communication its draft forecast for the total number of enquiries for each of the following three months, accompanied by a description of related resource planning measure. This must be done no later than five working days before the start of first of these months. DG Communication will provide its comments in view of an agreement before the start of the month.

# 2 Staff

## 2.1 Qualifications

The contractor must fill all positions listed below with staff who meet the specified requirements throughout the duration of the contract.

Scalability is a key requirement, and the number of communication officers must be adapted in line with changes in the number of enquiries while maintaining the agreed-upon service levels.

All EDCC working languages must be covered during the contact centre's opening hours by communication officers with the language skills specified in section 2.2.1 below. In addition, all EDCC staff must have an excellent command of English, which is the internal working language of the contact centre and the primary language for communication with DG Communication.

The Commission reserves the right to ask at any moment for evidence of staff skills, knowledge and experience.

## 2.2 Compulsory posts

The contractor must fill the following posts after having submitted to DG Communication the curriculum vitae (CV) of the candidates for prior approval.

Only this staff can be in contact with citizens and reply to enquiries.

The contractor is free to organise any other functions.

The contractor is also free to decide the number of communication officers and supervisors it employs.

### 2.2.1 Communication officer

The primary task of the communication officer is to reply to enquiries. They must have:

a. a level of education which corresponds to completed tertiary studies of a least three years certified by a diploma;

b. good knowledge of EU institutions, programmes and policies;

c. basic familiarity with the public sector entities in the EU countries of the languages they work in to provide information about local contact points for EU matters;

d. the ability to communicate with citizens in a service-minded style and to explain complicated matters in clear language orally and in writing;

e. written and spoken language proficiency of native or bilingual level in the languages they work in. This corresponds to level C2 in all the three categories for understanding, speaking and writing in the Common European Framework of Reference for Language skills.[2] The contractor determines the languages that each communication officer will cover in their work;

f. an excellent command of English.

### 2.2.2 Supervisor

Supervisors are in charge of overseeing operations in defined policy areas by providing coaching and by correcting and validating the work of the communication officers.

Supervisors have the following tasks:

a. coordinate all work in relation to certain dedicated EU policy areas;

[2] https://europass.europa.eu/en/common-european-framework-reference-language-skills

b. provide communication officers with coaching, correct and validate their work in relation to the policy areas;

c. act as contact points for associated services responsible for the policy areas;

d. monitor developments in the policy areas, if necessary take initiative to update EDCC knowledge items;

e. edit and draft EDCC knowledge items;

f. contribute to reporting on trends in the enquiries;

g. contribute to quality control management.

The contractor can decide whether the supervisors have additional team leader tasks.

A supervisor must have the same qualifications as a communication officer, and in addition a diploma in EU-related subjects or two years' experience of working in the EDCC or in a position similar to that of a supervisor.

### 2.2.3 Liaison officer

Liaison officers are supervisors working for the contractor and attached to the DG Communication back office. They act as the interface between DG Communication and the contact centre.

Their main tasks are:

a. handle second-level enquiries that are of corporate nature and fall outside the remit of other associated services, particularly those concerning DG Communication and horizontal political issues;

b. assist DG Communication's back office in other operational activities, in particular knowledge and quality management.

Two liaison officers must be designated, and the contractor must ensure backup of their tasks if they are both absent.

The liaison officers are given access to specific Commission IT systems and the possibility to work with Commission IT equipment (PXE).

The liaison officers must be able to come in person to Commission premises in Brussels, at least for certain steps necessary for their accreditation.

DG Communication will select staff from the list of candidates proposed by the contractor and give final approval. A liaison officer must have the same qualifications as a supervisor.

### 2.2.4 Project Manager

The Project Manager is responsible for the operational delivery of the contact centre services. The Project Manager is in charge of all organisational tasks and is the primary point of contact with DG Communication. The Project Manager works full time with the contact centre and takes full responsibility for the entire operation, in particular:

a. recruiting, training motivation and retaining staff;

b. quality assurance;

c. daily contact with DG Communication;

d. quantitative and qualitative reporting;

e. ensuring adequate response capacity of the contact centre;

f. following up on financial aspects of the contract;

g. managing the accessibility of the contact centre's communication channels, including measures to ensure access to the free phone number in all EU Member States;

h. overseeing the cooperation with associated services;
i. information security policy enforcement;
j. business continuity measures.

The Project Manager must have at least five years of relevant professional experience, with a minimum of three years of experience working in a contact centre.

### 2.2.5 Deputy Project Manager

To provide full backup for contacts with DG Communication, a deputy Project Manager must be appointed who can step in for any of the project manager’s functions.

The deputy Project Manager must have at least three years of relevant professional experience.

## 2.3 Compulsory functions

The contractor must ensure that at least the following functions are fulfilled. The contractor is free to organise how this is done.

### 2.3.1 Knowledge management

This task is to establish and promote a culture of knowledge exchange and ensure that the communication officers have the relevant knowledge available to effectively answer enquiries. A knowledge management officer is responsible for overseeing the work to guarantee that the knowledge base's content remains up-to-date and accurate at all times. This role requires taking the initiative to continually enhance and develop the knowledge base. Experience in AI is required for this role.

### 2.3.2 Quality control

The quality of the replies given to citizens must be constantly monitored and all necessary efforts be made to improve it.

### 2.3.3 Training

Internal staff training must be delivered by a professional trainer, who collaborates with DG Communication to identify training needs and brings in external trainers as needed.

### 2.3.4 Reporting

A reporting officer must be the contact point for DG Communication for matters relating to reports and forecasts.

### 2.3.5 Data analysis

The contractor must have the capacity to draft analytical reports that present insights from EDCC related data in a professional style. This will mainly be used for political intelligence derived from the enquiries addressed to the contact centre, cf. section 3.3.3.

### 2.3.6 IT support

There must be a one-stop contact point for DG Communication for all aspects related to IT.

### 2.3.7 Communication assistance

Occasionally, DG Communication may request the contractor to provide support with timely communication activities directly linked to EDCC activities, including tasks such as designing professional reports, creating social media content, or developing promotional materials.

## 2.4 Staff training

The qualification of the communication officers is essential for the success of the EDCC. Therefore, a systematic initial training and an ongoing training and skills development scheme is essential.

The contractor will provide for regular and specific training of their staff, at a high level of knowledge, both on content-related issues and for technical, functional and procedural aspects. This has to be maintained and developed over the entire contract period.

To address specific training needs, training sessions can be proposed by the contractor, DG Communication or associated EU services. A compulsory introductory training programme of a minimum three-week duration must conclude with a test that proves that the staff is qualified for deployment.

The compulsory introductory training includes, among other things:

a. EU content
   i. a detailed presentation of the EDCC knowledge base;
   ii. a detailed presentation of the Europa website, including official EU databases;
   iii. a presentation of associated services and follow-up to replies provided by second-level back offices;
   iv. a presentation of other EU outreach and information services;
   v. an overview of specific policy areas and dealing with sensitive topics;
   vi. requirements for translating and summarising content in English.

b. Contact centre skills
   i. knowledge of the procedure for managing enquiries via the CRM system and the contact centre’s IT environment;
   ii. contact centre telephone skills (conversational and communication skills, question and interviewing techniques, voice training, handling difficult conversations, etc.);
   iii. clear writing;
   iv. instant messaging techniques;
   v. specific techniques to answer by e-mail;
   vi. dealing with complaints and conflict situations;
   vii. security of information and data protection;
   viii. efficiency and contractual service levels.

At the beginning of the contract, DG Communication will organise training sessions held in English for the trainers and other staff selected by the contractor. This will cover subjects related to EU content.

## 2.5 Training on the use of contact centre tools

The contractor will provide for members of the back offices, at no additional cost, starter trainings on the use of the CRM system and knowledge base and on the workflows in place for dealing with second-level enquiries.

The contractor must also ensure continued support on the use of contact centre tools for members of the back offices by providing online technical documentation and a central helpdesk accessible by e-mail and telephone.

# 3 Performance indicators and reporting

The contractor must provide DG Communication on a regular basis with data on the activities performed. The indicators are specified below.

The contractor must set up the appropriate systems to measure these indicators in a reliable, accurate and tamper-proof way, and make the data available to DG Communication in the way described below in section 3.3.

The data collection, processing and reporting methodology will be constantly scrutinised by DG Communication. The contractor has the obligation of full transparency on all relevant elements, including access for third parties mandated by DG Communication, such as independent auditors.

All performance indicators are to be calculated and reported per working day, per week and per month. A working day is defined to last from 09.00 to 18.00 Central European Time (CET).

There are two categories of indicators:

a. **key performance indicators:** a limited number of indicators which have been selected as the most important indicators of the overall quality and efficiency of the service provided by the contractor. They are compared with contractually set targets and feed into the bonus-malus system, which gives the contractor financial rewards to perform better than the targets, or financial penalties for not fulfilling the targets.

b. **other indicators**: these are also essential to monitor the quality and efficiency of the service provided but are not used for the bonus-malus system.

## 3.1 Key performance indicators (KPIs)

The following KPIs are used to monitor the quality and efficiency of the services.

### 3.1.1 First-level resolution rate

The staff of the contact centre must strive to answer directly at first level to as many questions as possible within the applicable guidelines, see section 1.7.

The first-level resolution rate is the share of all answered enquiries, regardless of communication channel used, that are resolved during the first contact, that is:

i. without escalation to the second level;

ii. without further communication than the first step, such as a later reply by e-mail following up to a phone conversation.

The following **exceptions** can apply:

i. When an associated service gives written instructions that a certain type of enquiries must always be escalated, these enquiries are exempted from the calculation of the first-level resolution rate.

ii. It can happen that the EDCC receives a number of similar enquiries on the same subject, typically on a topic deemed sensitive in relation to current political affairs. In this situation, the contractor – after prior agreement with DG Communication – escalates only a representative sample of such cases. The reply to these model cases is then expected also to be used for the other enquiries, which are ‘set aside’ and do not count for the first-level resolution rate.

**Target: The first-level resolution rate must not be less than 95%.**

### 3.1.2 Pickup time for phone calls

This is the decisive parameter for measuring the telephone availability of the contact centre. It is the number of seconds measured from the time the call is routed to a communication officer to the time when the call is picked up.

**Target: At least 80% of calls have to be answered within 30 seconds.**

### 3.1.3 Average response time for e-mails (first level) and second-level forwarding

The average response time for e-mails (first level) designates the time elapsing between the moment of arrival of an enquiry and the moment when the response is sent to the citizen. In addition to normal replies by e-mail, this includes also follow-up e-mails, or callbacks for enquiries that could not be resolved within the first contact. It is expressed in working days, calculated by tracking the exact time from arrival to response, down to the minute. In addition to the average KPI, DG Communication must also have access to the handling time of each enquiry.

The second-level forwarding time is calculated in the same way as the average response time for e-mails, but concerns enquiries that have to be escalated to back offices. This aspect covers e-mail, phone and chat cases.

In addition to the overall average, these indicators must also be broken down by language, allowing DG Communication to monitor the contractor's obligation and capacity to respond in all EDCC languages.

**Target: The average response time must not be more than one and a half day (13.5 working hours).**

### 3.1.4 Quality of replies and of knowledge

DG Communication will make a monthly quality evaluation of a representative sample of the responses provided to citizens, using the quality criteria and methodology specified in section 3.4. This evaluation will also assess the quality of authored content in the knowledge base. It results in an average quality score on a scale from 0 to 100.

**Target: The quality of the replies and knowledge must obtain a score of at least 80.**

### 3.1.5 Citizens' satisfaction rate

The contractor must invite all citizens to participate in a satisfaction survey after they have received a reply. This is done according to the methodology specified in section 3.5, which results in a satisfaction rate expressed as a percentage.

**Target: The citizens' satisfaction rate must be at least 80%.**

### 3.1.6 Staff satisfaction

The staff satisfaction and thereby the quality of the human resource management of the contractor are measured as follows:

a. **unplanned absences,** defined as the number of working days lost to unplanned illness and other unplanned reasons, as a share of the total number of staff working days. This is compared to a standard of 7%;

b. **staff turn-over**, defined as the number of staff members who left their position as a share of the total number of staff within a certain period. This is compared to a standard of 10%.

This is aggregated with equal weight into a staff satisfaction rate expressed as a percentage, where 80% represents the mentioned standard values.

**Target: The staff satisfaction rate must be at least 80%.**

## 3.2 Other indicators

To ensure a high quality and efficient service, the contractor must in addition provide the following data:

a. **handling time per enquiry**: the CRM system must be able to accurately record it, including both the time spent interacting with a citizen via phone or messaging apps, as well as the time required for other tasks such as registration, even if these activities are not consecutive. The working time of a communication officer is allocated exclusively to one enquiry at a time for telephone calls and e-mails. However, chat responses can be counted for multiple enquiries simultaneously if they are handled concurrently. Only the working time of communication officers is included in the count, not the work of supervisors or other staff categories;

b. **average handling time (AHT) per enquiry, per channel**;

c. **returned second-level enquiry handling time:** this designates the time elapsing between the moment when the EDCC receives a reply from a second-level back office and the time when the EDCC sends the final reply to the citizen. It is calculated the same way as the average response time (i.e. it must not be more than one and a half day: 13.5 working hours);

d. **share of abandoned calls:** a call is considered abandoned if the citizen, after having waited 30 seconds or more, hangs up without either speaking to a communication officer or leaving a voice message. The rate of abandoned calls must be shown for each language separately;

e. **participation rates in the citizens' satisfaction survey**, per channel, as well as access to the raw data of all replies;

**f.** **number and breakdown of staff on duty**;

**g.** **coverage of languages of staff on duty**;

**h.** **average** number of enquiries solved by each communication officer;

**i.** **number of enquiries per channel received, answered, pending and escalated to second level (including the time elapsed since the escalation) as well as 'set aside' cases**;

**j.** **uptime of the CRM system and the knowledge base;**

k. **forecast accuracy:** the contractor must forecast the number of enquiries, cf. section 1.11. The forecast accuracy is calculated monthly, as the difference between the latest agreed forecast and the actual number of enquiries, expressed as a percentage of the actual number;

l. **success rate of any AI classification tool**, whether integrated in the CRM system or the knowledge base;

m. **indicators related to the knowledge management** that are determined in light of the organisation of the database that the contractor sets up. They should indicatively include:

    i. the pertinence and rapidity of the search function;

    ii. the number of documents created and updated, number of times a document is accessed (a useful document is accessed frequently). DG Communication wants to use this indicator to figure out which documents are the most and least useful. This also helps the contractor to train their agents on the relevant topics first;

    iii. the number of documents with an expired review date: to ensure the efficiency of the document publication process, the number of documents that have not been reviewed in a timely manner must be monitored;

    iv. the time of knowledge input: the time it takes to insert a standard reply in the knowledge base after it has been validated by the back office.

## 3.3 Reports and monitoring

All data must be collected by the contractor within a single system and must represent the cumulated data for all communication channels. DG Communication must have remote access to this system so that it can view reports independently at any time. The data should be displayed in the CRM system and the system must also generate reports that are sent to DG Communication by e-mail or via collaborative tools. The reports must be reproducible, traceable and transparent, with the underlying data, methodologies, and other relevant factors clearly documented and available for review.

Each back office of the associated services must in the same way have access to the data that relate to enquiries on the topics of its competence. Each back office must receive automatically generated reports.

DG Communication and the contractor agree on a set of predefined and automated reports that will be sent on a regular basis. They indicatively include:

a. a daily report for DG Communication;

b. a monthly report for each back office.

The reports are presented in tabular form with graphs for key data wherever it aids understanding, and with captions and explanations that allow non-experts to read the reports. Other forms of presentation are also acceptable, provided they serve the purpose and are agreed upon by DG Communication.

In addition, annual reports will also be produced for DG Communication and associated services.

The contractor shall be available to help DG Communication with any ad-hoc reports that are not predefined ones, including cross-referenced data or extracts of texts of any data held.

The reports will be used for the internal purposes of DG Communication and the associated services but may also be published in total or in part by these services.

Automated and direct data feeds to the management dashboard of DG Communication to provide information about key trends and topics should be established.

### 3.3.1 Monthly administrative report

The monthly activity report to be used for contractual invoicing purposes is to be transmitted separately as an administrative letter and will include all narrative comments and data that are relevant to assess the performance of the contractor. The specific format of this report will be determined by DG Communication and the contractor.

The contractor will transmit this report to DG Communication by the 10$^{th}$ (tenth) calendar day of the following month at the latest.

### 3.3.2 Feedback on EU information sources and websites

The contractor will give feedback to the Commission as to the user-friendliness, relevance and accuracy of the official EU websites they use when looking for information to answer enquiries, as well as any other information gaps detected in official EU information sources. This is intended to provide associated services and website owners with suggestions for improvement.

This feedback can be included in the monthly report, as part of the knowledge base system or in other ways to be defined.

### 3.3.3 Analytical reports

DG Communication may ask the contractor to produce analytical reports, typically on political themes, to help the Commission understand the interests of citizens as expressed in their enquiries.

The analytical reports identify trends related to topics, geography, demography etc. They are primarily based on data and AI-generated insight but might include qualitative data such as the staff's impressions of the tone and nature of enquiries.

Data should be accompanied by a concise, clear, and professionally written text that summarises the main findings and insights from the data. This text should be based solely on facts and should not include speculative or opinion-based commentary. Where suitable, visual aids such as data visualisations, process charts, and infographics should be included to support the reports.

The reports must be drafted by a person with professional qualifications in drafting analytical studies.

Two analytical reports per month are included in the basic operations. Further reports requested by DG Communication will be paid extra.

## 3.4 Quality control

### 3.4.1 Quality control by the contractor

The contractor will ensure internal quality control on an ongoing basis. The methodology for quality control has to be described in the tender.

The contractor must have a suitable control system in order to check and to improve continuously the quality of staff performance in terms of knowledge, language and communication skills with regard to the agreed standards and specifications of DG Communication. In addition to traditional organisation of work and ex-post control, this might include concepts specific to contact centres:

a. regarding telephone calls: speech analytics of recordings, silent monitoring, keyword spotting, side-by-side coaching;

b. regarding e-mail and messenger apps: text modules as part of a knowledge system, software for spellchecking and clear writing, four-eyes principle, etc.

The contractor must also control the quality of the given answers in a way similar to what DG Communication does in accordance with section 3.4.2. The contractor is requested to share the outcome of this quality control with DG Communication in order to coordinate the quality management actions.

### 3.4.2 Quality control by DG Communication

DG Communication will perform a monthly quality control on a sample of at least 1% of all enquiries answered in the previous calendar month. The contractor must make this possible. The selection can either be by random choice, or it can be a selection with weighting factors like channel, theme of enquiry, etc. The sample must include access to recordings of phone conversations.

This quality control is done by DG Communication. However, DG Communication might also involve associated services in the work or hire independent external help. Results of mystery enquiries might also be included in the quality control.

The CRM system must include a feature that allows DG Communication or other assessors to access the cases of the sample, facilitating the assessment.

The methodology scores every enquiry controlled. Only enquiries answered at first level are included.

The scoring methodology is based on the criteria outlined in the following table, which assigns a score between 0 and 100 to each evaluated enquiry. The overall quality control score for a given month is calculated as the average score of all evaluated enquiries.

| | Maximum score per criterion |
|---|---|
| Accuracy and correctness of the reply | 30 |
| Relevance and adaptation of the reply to the individual situation | 30 |
| Presentation: politeness, clear presentation, absence of grammar and language errors | 25 |
| Quality of the translations and summaries for working purposes | 10 |
| Correct registration of topic and other recording | 5 |

The quality control by DG Communication can furthermore include entries of authored content in the knowledge base. The quantity is decided by DG Communication. The score is given by applying the following criteria:

| | Maximum score per criterion |
|---|---|
| Accuracy and correctness of the entry | 50 |
| Clarity of the presentation | 25 |
| Speed and efficiency of updating | 25 |

## 3.5 Citizens’ satisfaction survey

Citizens’ satisfaction surveys aim to continuously improve the EDCC's services with regard to efficiency, speed, support and quality of the answers provided. They are used as parameters to measure service quality. Therefore, the contractor must offer citizens a satisfaction survey for each replied enquiry. The satisfaction survey is similar for all channels and must be conducted in the language of the enquiry.

The satisfaction survey for the **phone conversations** is carried out via Interactive Voice Response (IVR). This means that at the end of a call, the communication officer will ask the citizen to take part in the satisfaction survey and the citizen is then automatically redirected to IVR. The survey might also be announced during the call waiting time.

The contractor shall provide a suitable system for **e-mails and chats**. The reply e-mail contains the request to the citizen to take part in the satisfaction survey. The same applies to closing text messages in messenger apps. Citizens should be able to easily access and complete the survey directly in the reply e-mail or chat, with a maximum of one single click. The questions shall indicatively ask about:

a. the content of the reply;

b. the tone and style of the reply (friendliness, clarity etc.);

c. the time the reply took;

d. whether the citizen would recommend the services to other citizens.

The scores are accumulated to an overall satisfaction index expressed on a scale from 0 to 100.

There should also be an option for free text or a voice recording which allows the citizen to explain freely the reason for the satisfaction score given. The contractor must provide a monthly analytical summary of these comments.

In agreement with, or upon request of, DG Communication, survey questions and modalities may be adapted over time in order to assess particular aspects of the service. That includes specific features of the services provided by the contact centre on behalf of other EU services. In addition, short and simple questions about certain aspects of EU policies may be added temporarily to regular surveys.

The contractor should aim to obtain a participation rate of 10 %.

DG Communication must have access to the encoded raw data as well as to the results.

# 4 Knowledge management

## 4.1 Knowledge to use

The contractor is responsible for maintaining and improving the knowledge needed to reply to the enquiries.

This must be organised in the knowledge base, which must have one single user interface.

The contact centre shall use the following sources of knowledge to reply to enquiries:

a. **EU websites**: information published on official websites of the EU institutions and bodies[3];

b. **'reference replies'**: previous replies provided by the EDCC. These are often based on escalations to back offices and have been selected as useful for future re-use based on their lifespan and other criteria defined together with DG Communication;

c. **other official data sources** to which DG Communication provides access through direct AI-based interconnections. These can be public or internal databases or systems. Notably, this can include the future general AI knowledge system of DG Communication which will provide a 'virtual assistant' service for EU communicators;

d. **'authored content'**: texts created by the contractor based on information provided by DG Communication or associated services specifically for the contact centre (briefing notes, model replies, training, guidelines, etc.).

The knowledge shall as first priority be based on the first three categories of sources. Where this is not sufficient to reply to the enquiries, for example if information on EU websites is not operational enough, the contractor creates the necessary authored content.

The contact centre staff can use general knowledge or other sources as part of their research for replies, but all replies must be based on the sources mentioned above. Citizens must never be referred to non-EU websites unless a  back office has explicitly instructed to do so.

The main objective of the knowledge base is to help the contact centre answer citizens' enquiries. However, it should also exchange data with other knowledge systems of the EU via API connections, making the EDCC knowledge available to Commission services.

## 4.2 The knowledge base

The CRM system and the knowledge base are two separate IT systems.

The two systems must be integrated in a way that makes the work of the communication officers as efficient as possible. Their access to the knowledge base is integrated in the CRM interface, so that AI functions propose replies to incoming enquiries and help communication officers with further research. It must be easy for communication officers to use the AI-based proposals in their replies.

It must be possible to access the knowledge base from the outside, via advanced technical connections or classic web access.

### 4.2.1 Start of the contractual period

The contractor will receive the content of the existing knowledge base when the framework contract is signed and is expected to organise the use of the knowledge from the moment of switchover.

The existing knowledge base has been used to help replying to questions under the same principles as described in these specifications.

[3] The sites of individual EU institutions (https://commission.europa.eu, https://europarl.europa.eu, https://www.consilium.europa.eu, etc.) provide detailed information on their activities.

It currently consists of text equivalent to a quantity of around 500 webpages or websites, around 400 reference replies and around 1 200 pages of authored content.

The contractor will furthermore get access to the technological help functions that have been used for the knowledge base under the previous framework contract, in the form of technical documentation, training data etc. The contractor is free to use or be inspired by this. However, the contractor must be able to operate all necessary functions of the knowledge base by their own technological means and explain in the tender how they intend to do so. At the start of the contract period, the contractor must provide to DG Communication full documentation of the AI solutions put in place.

### 4.2.2 Functional requirements

The knowledge base should be:

a. user-friendly, efficient and rapid, allowing to perform operations with a minimum number of clicks;

b. drafted and maintained in English;

c. embedded in and accessible from the CRM system, so that EDCC staff can easily use the tool whilst answering a citizen's enquiry;

d. directly accessible to DG Communication and other related services to which access provisions are granted under work agreements (circa 250 access provisions as a start).

The contractor must produce the technical documentation of the knowledge base and make it available to DG communication.

If the contractor intends to use the knowledge base for purposes beyond those specified in section 4.1 (such as operational instructions, contact lists, etc.), it must be kept technically separate, so that external access and AI functions only relate to those defined categories of content.

All entries of the knowledge base must be marked:

e. with **the date when the content and source were last verified**. This must be visible for all staff and external partners who have access;

f. with **the date of the next control of the content**. This is part of a system whereby all content is reviewed at periodic intervals. The date of subsequent quality control checks will be determined based on the expected lifespan of the topic, taking into account factors such as its sensitivity and volatility (sensitive political topics will have a very short lifespan, while established legislation might have a long lifespan).

### 4.2.3 Technical requirements

The knowledge base must have the following characteristics:

a. It must follow the **RDF model** (Resource Description Framework knowledge graphs, which are using World Wide Web Consortium open standards), or at least be RDF-capable or RDF-compatible.

b. It must be **NLP capable**. For unstructured content, Natural Language Processing (e.g. entity extraction and classification) should help pave the way for AI-assisted processing.

c. **AI-assisted processing** should help identify accurate answers or propose a ranking of potentially valid sources of information in case of several pertinent search results available. Via generative processes it proposes a wording for the reply, based only on information within the knowledge base and with reference to the sources used.

d. All AI functions must be operated internally by the contractor or provided by DG Communication. It is forbidden to implement functions that require sending data to third party providers, such as commercial AI tools.

e. AI functions must be able to measure the quality of the proposed reply. This is used to ensure continuous improvements and to judge whether at a later stage certain categories of replies might be provided directly to citizens.

### 4.2.4 Content management

The contractor must, in agreement with DG Communication, set up a content management and validation process for the knowledge base:

a. Dedicated staff (such as a knowledge officer and supervisors) are responsible for ensuring that that the knowledge is up to date and provides clear and practical information for citizens.

b. The contractor proactively proposes strategies to expand content in case gaps are identified.

c. The contractor edits and adapts contributions from associated services to create authored content.

d. The content is approved for use by the contractor via an internally documented process. Associated services are consulted for advice on ad hoc basis. DG Communication monitors the quality of this work by an ex-post quality assessment of samples, cf. section 3.4.2.

### 4.2.5 Technical provision of content

a. **EU websites**: the contractor must be able to identify and harvest information from official EU websites, using appropriate methods such as web scraping or API-type direct access to source of web content.

b. **Reference replies**: these must be transferred from the CRM system. The workflow in the contact centre must foresee some manual steps which must be integrated in the CRM system:

    i. selection of suitable replies: The reply must contain additional information or a different presentation of added value in comparison to information that is available on EU websites. Second-level replies would often fulfil this criterion. The detailed criteria are agreed with DG Communication;

    ii. anonymisation of selected enquiries: Name and contact information included in the enquiries must not be transferred to the knowledge base. The text of enquiries and replies must be screened by an automated system to ensure that no personal information is included in the text.

    iii. tagging of selected enquiries for expected validity time of content that feeds into the system for ‘date for next control of content’, see section 4.2.2.

c. **Direct access to other official sources**: Each case of this will be an operational development project (see section 6.1.2), where details of content and technical access will be agreed with DG Communication.

   DG Communication is currently developing an AI-based ‘virtual assistant’ to support its various activities. It will provide knowledge that can be used in the EDCC knowledge base. It can also serve as a channel to share EDCC knowledge with others in the Commission and potentially allow the EDCC to benefit from AI functions in the Commission. However, the contractor must be able to operate the contact centre from the start of the contract with other means. DG Communication cannot give specifications on this project for use in preparation of tenders for the contract.

d. **Authored content**: The contractor is responsible for creating, editing and maintaining these entries.

### 4.2.6 Transfer of the knowledge base and end of contractual period

At the end of the operation period of the framework contract, the contractor must transfer the knowledge base to whoever DG Communication designates to receive it. It must be possible for others to operate the knowledge base. This implies that the text is saved in widely used formats; that any software or other technological elements are open source, free of third-party rights or dependence on any third-party technical systems; and that all aspects of the knowledge base are documented in manuals.

At any moment during the contract implementation DG Communication might request a transfer of the knowledge base to another party/entity.

Costs to transfer the knowledge base are covered by the basic contractual payment.

# 5 Infrastructure

## 5.1 Location

The location(s) of the EDCC premises is to be determined by the contractor. It must be situated within the EU.

The contractor will have to provide a flexible infrastructure that can accommodate variable numbers of communication officers as required.

The members of staff may be based at the contact centre's location or locations, or they may be working remotely. In the latter case, it is the contractor's responsibility to ensure that they have full access with a high-quality connection to the CRM system, knowledge base, telephone system and other relevant IT tools.

The staff may only work from geographical locations within the European Union or the countries that have been formally approved by the European Commission as having an adequate level of data protection in relation to EU data protection legislation.[4]

For protection of personal data, see also section 5.6 and the mentioned rules in the framework contract.

## 5.2 Telephone

### 5.2.1 Free phone number

The European Commission has set up a single Universal International Freephone Number (UIFN): **00 800 6 7 8 9 10 11**. The UIFN is currently accessible in all EU Member States via a fixed line, and more than 95% of mobile subscribers in the EU can reach it.

The contractor, and in particular the telecom operator chosen by the contractor, must be able to maintain the service under this free number in all EU Member States. The contractor will undertake all necessary actions to guarantee free access to the UIFN number to the largest possible public in all EU Member States.

The contractor must also monitor and report regularly on the accessibility of the UIFN and take action to open up access where problems are identified. The frequency of reporting will be agreed at the start of the contract with DG Communication.

### 5.2.2 Other telephone numbers

A standard fixed-line telephone number (**+32 2 299 96 96**) for which standard charges apply to the caller, is in place for phone calls from anywhere in the world. This number is installed at the European Commission in Brussels and is linked to the EDCC via a call-forwarding system, without a calling line identification presentation (CLIP) service.

The contractor must take relevant steps to facilitate citizens' access to the contact centre via internet-based telephony. This can for example include technical adjustments or setting up accounts with the main service providers for this purpose.

All costs related to infrastructure and telecommunication - including telephone communication costs for the number 00 800 6 7 8 9 10 11 – will be borne by the contractor.

The contractor should have phone facilities for the following SMS (text message) interactions in place:

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[4] Data protection adequacy for non-EU countries: https://commission.europa.eu/law/law-topic/data-protection/international-dimension-data-protection/adequacy-decisions_en

a. to receive callback requests (see section 5.2.5);

b. to send relevant links during a phone conversation (see section: 1.10).

### 5.2.3 Interactive Voice Response (IVR) and voice mail

An Interactive Voice Response (IVR) system must be provided. This shall in particular be used for incoming calls from multilingual countries, allowing callers to choose their preferred language.

A voice mail message must be provided for all phone numbers outside the opening hours. It should offer the possibility of a callback request.

While callers are on hold, automated messages or announcements may be played to keep callers informed.

DG Communication must approve the wording of any messages.

### 5.2.4 Recording of calls

All calls must be recorded. Callers must be informed of this.

DG Communication must have remote access to playback, see sections 3.3 and 3.4. on reporting and quality control, etc.

### 5.2.5 Callback requests

The contact centre must ensure the processing of callback requests received via:

a. SMS: The contractor must set up a phone number to receive such requests;

b. a dedicated interface for the 'scheduled callback' service: It must be provided as one of the webforms on the EU website. The 'scheduled callback' interface must, as a minimum, offer users the possibility of selecting the preferred language and time for the callback.

The current webform for callback requests is available here: https://europa.eu/european-union/contact/call-us_en.

## 5.3 E-mails

### 5.3.1 Incoming e-mails

All enquiries via e-mail are submitted exclusively via structured webforms available for citizens on the European Union’s official websites.

a. There are **two types** of forms:

i. a general webform. The current general webform is found here: https://europa.eu/european-union/contact/write-to-us_en

ii. specialised webforms, which contain the same fields as the general form, but have additional fields for particular topics related to associated services. There are currently seven such specialised webforms. An example of a current specialised form can be found here: https://research-and-innovation.ec.europa.eu/contact-us/research-enquiry-service_en

b. The contractor is responsible for the following **tasks**:

i. configuration of the webforms, which are then embedded in EU webpages. The contractor must place them on a suitable secure webpage. The forms must be available in all working languages of the EDCC, or fewer if DG Communication decides so;

ii. reception, in real time and in a safe way, of e-mails coming in from the webforms;

iii. cooperation with DG Communication on matters such as defining the fields of webforms and all related questions.

The contractor manages a list of citizens who wish to add their e-mail to the Europe Direct mailing list or agree to be recontacted in a similar way during a chat by instant messaging. The contractor makes the lists available to DG Communication upon request at any time.

### 5.3.2 Outgoing e-mails

Replies provided by e-mail should be sent from a no-reply e-mail address to be set up by the contractor. The display name of the sender must be agreed upon with DG Communication in advance.

The e-mails must be sent in a technical format that can be displayed quickly and correctly on as many devices as possible.

The footers must, in addition to the satisfaction survey (section 3.5), show messages of a general nature. They must therefore be adaptable to varying messages, with the technical option to include audiovisual elements and automatic feed of content from other sources, such as social media. The content of email footers can vary depending on the language or subject of the citizen's enquiry.

The e-mail management system must be equipped with modern and reliable anti-virus and anti-spam functionalities for both incoming e-mails (via webform) and outgoing e-mails.

The system must enable secure handling of attachments in exceptional cases, while receiving or sending attachments is generally not permitted in regular incoming enquiries and replies.

## 5.4 Instant messaging apps

The contractor will set up any required facilities to enable interaction with citizens via the instant messaging apps selected in agreement with DG Communication. The service is expected to cover the instant messaging apps most widely used in the EU.

At the outset of the contract, the following instant messaging applications will be utilised: WhatsApp, Facebook Messenger and Signal. Additional messaging applications might be required due to ongoing changes in consumer behaviour and technological advancements which demand continuous adaptation to the rapidly evolving digital landscape.

When operating this service, the contractor must take into account demands of DG Communication to connect instant messaging apps to other platforms, such as EU social media accounts.

The contractor pays for any costs needed to operate the instant messaging channels.

## 5.5 Customer relationship management (CRM) IT system

### 5.5.1 Specifications for the CRM system

The contractor must implement a customer relationship management (CRM) IT system, which manages, processes and monitors all steps related to the handling of enquiries.

If the system consists of several sub-systems, they must be fully integrated and display to staff and back offices a unified front-end interface, which is user-friendly, efficient and fast to use.

The use of the knowledge base must be integrated in the CRM system, especially within the user interface, while also meeting the other specifications outlined in section 4.

The system must fulfil the requirements for running a contact centre and in particular the following requirements:

a. The CRM interface must be as clear, simple and intuitive as possible in order to ensure efficient work by all users.

b. The language of the CRM system must be English.

c. User assistance and on-line technical documentation has to be provided to users.

d. The CRM system must allow easy and secure access for users in the back offices of associated services to any information they need. Secure access must be provided by means of a username and password mechanism. Provision should be made for compliance with the specific security settings (network, browser) of the European Commission. The identification of users with access must be done by use of the 'EU login' authentication system.[5] The contractor must sign up as an external provider using this secure identification system. 'EU login' must also be used for external web-access to the knowledge base, see section 4.2.2.

e. For escalations to second-level back offices, a notification by e-mail must be generated which contains all essential data about the enquiry.

f. The system must offer a feature allowing to easily send a standard holding reply to the citizen.

g. The character encoding must be suited to the current and future multilingual environment of the Commission. The system must therefore allow for the handling of texts in Latin and non-Latin alphabet character sets.

h. The system must allow to perform searches using any type of data that has been stored in it.

i. The system must be able to identify automatically and alert the communication officers about previous interactions with an enquirer. E-mail address, name, telephone number or chat ID can be used as identifiers for this purpose.

j. All functions of the CRM system must adhere to the data protection rules, see section 5.6.

### 5.5.2 Data fields

The CRM system must record:

a. all steps in handling of the enquiry, like the exact time it has been created, updated, transferred and closed, the reference number, status and origin of the answer, credentials of the staff involved, etc;

b. data on the enquirer and the enquiry, in particular all fields in the webforms and the full text of the enquiry, the reply, and for phone enquiries the recording with a summary in English;

c. the topic classification that the communication officer selects for each enquiry. This includes in particular a policy topic classification according to a taxonomy provided by DG Communication, and a classification of the 'type' of enquiry. The policy taxonomy is stored in the public register of controlled vocabularies of the EU as 'EDCC taxonomy'.[6] The contractor must download the classification taxonomy from here and assist in making potential modifications of the taxonomy as agreed with DG Communication. The contractor is encouraged to put in place a system that gives automated assistance to the classification;

d. the tagging carried out by the communication officer which will allow the relevant transfer of answered enquiries as 'reference reply' (see section 4.1) to the knowledge base for future use.

The exact list of data fields is to be agreed at the start of the contract.

The system should be flexible enough to allow modifications of the fields at no additional cost. These can for example be modifications in the webform related to special requirements of associated services; or changes in the topic taxonomy; or other questions that DG Communication wishes to have registered.

[5] Information about EU login : https://trusted-digital-identity.europa.eu/index_en
[6] EU taxonomies: https://op.europa.eu/en/web/eu-vocabularies/vocbench

### 5.5.3 Proposals for replies based on artificial intelligence

In accordance with section 4, AI-based functions must propose replies to enquiries based on the content of the knowledge base. The CRM system must enable staff to easily use and adapt the proposed replies.

From the start of the operations, the principle is that AI-based proposals are an internal support function, while validation of the content and dispatching of the reply are always performed by staff. If during the contract period some of these AI-generated proposals will reach a sufficient quality to be provided directly as responses to citizens, DG Communication might decide to implement this, while continuing an appropriate system of quality control by staff. This will be an 'operational project' as defined in sections 6.1.2 and 7.2. This might potentially include changes in the operation of the communication channels, like using 'chat bots' for filtering questions so that machine-generated support is available for certain enquiries.

### 5.5.4 Tools to support operations based on artificial intelligence

The CRM system must include state-of-the-art AI tools that help make the daily operations more efficient. This might in particular include:

a. detection of language, spam, threats, etc;
b. assistance for topic classification;
c. automated translations, see section 5.5.6;
d. summary of phone calls and chats, see section 5.5.7;
e. sentiment analysis and reporting of trends in the content of incoming enquiries;
f. assistance for drafting natural language replies and for clear writing from generative AI;
g. internal quality control by the management of the contractor.

Specific AI-based tools can technically be part of the CRM system or the knowledge base.

All AI solutions must be compliant with EU law, in particular the AI Act (Regulation (EU) 2024/1689) and the General Data Protection Regulation (Regulation (EU) 2016/679) (see also section 5.6).

### 5.5.5 Detection of language

The language of the request determines the assignment of an enquiry to a certain communication officer.

a. Telephone calls: An automated call distributor should be used to assign the call to a communication officer working in the relevant language according to the call's country of origin or the IVR asking callers to state their preferred language. It must nevertheless be possible to redirect the caller on demand to a communication officer speaking the language of the citizen's choice, irrespective of where they are calling from. The same method should be applied for SMS callback requests.
b. For e-mails and chat messages, the contractor must have an automated system in place that determines the actual language of incoming messages and assigns the enquiry accordingly.

### 5.5.6 Assistance by electronic translation

The contractor's workflow must integrate help functions to make the work of the staff efficient as follows:

a. automatic translation into English for working purposes of incoming e-mails and chat messages in other EDCC languages than English;
b. a feature that helps staff translate draft replies from English into the citizen's preferred language, if they should wish so.

Automated translation must always be checked and corrected by staff members as needed.

The contractor must use the European Commission eTranslation tool[7] for this. The contractor will be given access to the system and will have to set up the relevant direct connection needed.

### 5.5.7 Automated summary of phone conversations

Each enquiry replied on the phone or by chat must have a short summary in English of the essential elements of the question and the reply. The contractor must have an automated system to help with this (voice-to-text and AI–generated summary function including translation). The summaries must always be checked and when necessary corrected by staff members. The summaries must be anonymised so that no data can be related to individual persons.

## 5.6 Protection of personal data

In accordance with the legislation in force, DG Communication establishes a set of rules on how to store and treat personal data. The current record of processing operation can be found here: https://ec.europa.eu/dpo-register/detail/DPR-EC-00080.4. The 'privacy statement' can be seen here: https://europa.eu/european-union/contact/data-protection_en.

The contractor must follow these rules and the rules specified in the framework contract, in particular section II.9.2. The contractor needs to provide its staff with access to the rules in place prior to them taking on their tasks. Tasks specifically related to the contact centre operation include that the contractor must:

a. delete all personal data in its possession after the time period specified in the rules;

b. ensure that staff do not reveal personal data they have access to. Each staff member with access to the data must sign a declaration of confidentiality;

c. treat individual requests from citizens to access, modify and delete data;

d. ensure that whenever the wording of questions and replies are used in AI tools or otherwise, they are anonymised (see also section 4.2.5).

## 5.7 Extension of the service

DG Communication can at any moment request that the service is extended to cover additional countries and/or languages. This might happen in relation to candidate countries seeking to join the EU or new Member States or whenever a decision as to the number of official languages is taken.[8] This could also be decided by DG Communication for other strategic reasons.

The contractor must then ensure the availability of the service in that Member State and/or new language under the same conditions as in the other Member States as from the date requested by the Commission. The contractor must be able to set this up within a maximum timeframe of three months from the date of the request. This includes in particular access to all communication channels, handling of the language in IT systems and providing staff that speaks the language.

DG Communication pays a one-off fee for such an extension of the service. The contractual price structure does not change in other ways.

[7] More information on the Commission e-translation is found here.: https://commission.europa.eu/resources-partners/etranslation_en

[8] Current candidate countries and potential candidates: see https://european-union.europa.eu/principles-countries-history/eu-enlargement_en

## 5.8 Business continuity

The contractor must at any time have a business continuity plan, which outlines what is done to prevent emergencies from disrupting the operations and what is planned in case it happens anyway. It must cover:

a. communication channels, IT, the CRM system and knowledge base;

b. staff;

c. physical location.

The contractor must guarantee an uptime for the CRM system and the communication channels of at least 99.5% of the opening time.

## 5.9 Standard Operating Procedures

The contractor will submit a comprehensive set of Standard Operating Procedures that describes how all daily operations function and will become the operational basis for day-to-day management of the centre. This will be updated as needed, upon request and with the agreement of DG Communication.

## 5.10 Crisis response

The EDCC must be able to act as helpline to inform citizens about the European Union response to crises affecting the EU or parts of it. The contractor must be able to rapidly scale up the operations, by adding the necessary knowledge, resources and staff to address surges in contacts related to the crisis.

As part of this helpline function, the contractor must be able to record and run specific welcoming messages for the phone contacts, differentiated for each language if needed. The messages must be recorded and become available immediately after their approval by the DG Communication and not later than:

- 4 hours after the final approval within the normal opening hours;
- 8 hours after the final approval outside the normal opening hours.

The cost for any such intervention is included in the basic payment for operations.

# 6 Project specifications

## 6.1 Organisation

### 6.1.1 Steering committee

A steering committee must be set up in order to monitor the implementation of the contract. It consists of representatives of DG Communication and, on the contractor's side, the project manager and the deputy contract manager. It is the main contact point between the contracting authority (DG Communication) and the contractor. It ensures the overarching supervision of the work and records decisions on operational matters.

The committee meets twice per month during the 'phase-in/ phase-out' period (transition period) and at least every two months during regular operation. The contractor is in charge of taking the minutes of the meeting, which DG Communication must approve.

### 6.1.2 Operational projects

An operational project is a specific change in infrastructure, organisation or similar, meant to improve the service of the contact centre at a moment after the start of operations according to this contract. It can be:

a. within the obligations of the contractor according to this contract;

b. a request by DG Communication, paid as extra work.

An operational project is defined in writing, in agreement between DG Communication and the contractor. The agreement includes a timeline with the date by when the contractor commits to implement the project. In case said deadline is not met, DG Communication may decide to apply a penalty of up to -3% (minus three per cent) to the invoice. The penalty can be applied multiple times in case the contractor repeatedly misses deadlines.

## 6.2 Timetable and operating conditions

The contract resulting from this procurement procedure will start four months before the end of the current contract. The date where the contractor takes over daily operations from the previous contractor is indicated with 'N' in the chart below.

The timetable for this contract is divided into three sections (see the chart ):

a. phase-in/phase-out period which itself is again divided into **two parts:**

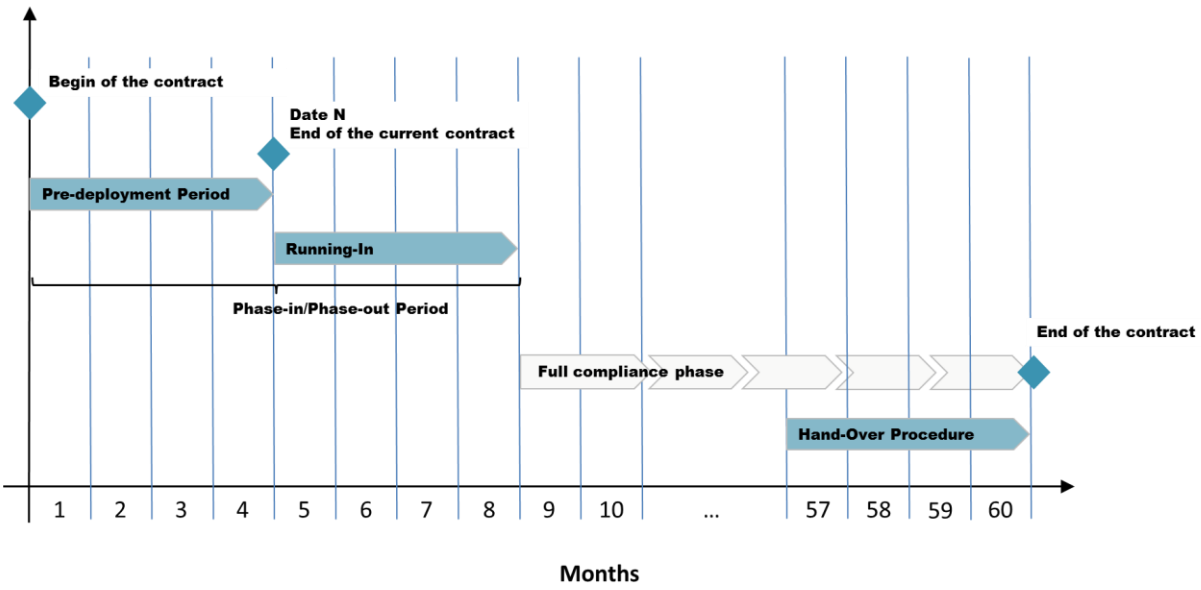
    i. the pre-deployment period and

    ii. the running-in period

b. full compliance phase;

c. hand-over procedure.

These phases are described in detail below.




### 6.2.1 Phase-in/phase-out process

The objective of the phase-in/phase-out procedure is to organise the migration from the current contractor to the new contractor and to ensure the proper transfer of all necessary elements while maintaining business continuity (both during the phase-in/phase-out period and after the end of the current contract).

This transition process should enable the new contractor to take over existing services without impacting the contact centre's performance or potentially creating a service-level degradation due to the transfer of the service.

The new contractor will be responsible for the phase-in/phase-out process and will manage the transition. During this phase, the new contractor will have to report twice a month to the steering committee to keep DG Communication fully informed of all aspects of the phase-in and phase-out process.

In addition, the new contractor must ensure the migration and integration of the following elements into their own systems:

a. universal international toll-free number and other telephone numbers;

b. all existing web submission forms;

c. interface for scheduled call back requests;

d. content of the current knowledge base;

e. relevant data from the current CRM system.

By the end of the phase-in and phase-out periods, the contractor must prepare and submit to DG Communication the complete documentation on the project organisation, infrastructure and procedures to fulfil all tasks. These documents must be regularly updated and will be part of the handover procedure at the end of this contract.

The phase-in/phase-out period will last eight months maximum: four initial months of pre-deployment (setting-up the infrastructure and recruitment and training of human resources) plus four months of running-in.

### 6.2.2 Pre-deployment period

During the first four months, i.e. from N minus 4 months to N, the new contractor will recruit and train staff. DG Communication will brief, train and monitor the trainers responsible for training the staff.

Guidelines for the handling of enquiries will be agreed with DG Communication. The functions, guidelines and operational procedures related to the agreements with associated services will be put in place. In addition, the new contractor will give access to the database for the staff of the back offices in DG Communication and in associated services and will provide appropriate training in the use of the knowledge base. The new contractor will conduct technical tests of the tools and interfaces in order to become fully operational on day N.

### 6.2.3 Running-in period

From day N, the contact centre becomes fully operational in accordance with the conditions laid down in the contract and the contractor takes charge of all enquiries, reports to the various services, etc.

During this running-in period, from N until N plus 4 months, all key performance indicators (section 3.1) must be met with the following exceptions:

a. calls answered within 30 seconds must be at least 70% (instead of 80%);

b. average response time to emails at first-level must not be more than two and a half day (instead of one and a half day);

c. the KPI on staff satisfaction does not apply;

d. the contractor takes over all unanswered enquiries that have come to EDCC before day N. They should be handled on the same conditions as other enquires and will be paid in the same way, but the KPIs do not apply.

The above derogations do not apply in case of an award of the contract to the current contractor.

### 6.2.4 Full compliance phase

All the contractual requirements must be fully met, i.e. the contractor has taken over the regular operation of the EDCC completely.

### 6.2.5 Hand-over procedure

At the end of the contract, the contractor shall provide the appropriate resources, materials and support for the transfer to a new contractor and will fully assist DG Communication during the transition period. The hand-over assistance to be provided by the contractor includes, but is not limited to, the following elements:

a. complete documentation on the project organisation, infrastructure and procedures to fulfil all tasks (cf. section 6.2.1);

b. content of the CRM database;

c. information transfer about the tools, interfaces and technical (IT and telecom) environment of the contact centre, including a complete technical description of the CRM database;

d. in case the knowledge base has not yet been transferred to the Commission as specified in section 4, transfer of information with full technical documentation and the content of the knowledge base;

The hand-over assistance and information transfer may be organised under the form of workshops and meetings. An official from DG Communication will be present at all such workshops and meetings.

The hand-over assistance shall be an integral part of the normal services rendered under the contract during the last four months of its duration and shall be provided at no additional cost. The monthly reports provided by that period should include information on the hand-over assistance.

If the contractor does not fulfil this obligation, the Commission reserves the right to apply liquidated damages in line with art. II.15 and II.16 of the framework contract.

# 7 Price

## 7.1 Overview of price structure

The payment for the services in this contract is calculated as follows.

### 7.1.1 Price per enquiry

The contractor is paid with a unit price for each enquiry that has been replied.

Payments are done according to monthly invoices. They are paid when all reporting of activities in a calendar month have been approved by DG Communication. The amount of the invoice is calculated as follows:

| |
|---|
| **number of enquiries replied x price per enquiry** |

The following adaptations are made to the amount.

### 7.1.2 Average handling time per enquiry

The price per enquiry depends on the average handling time (AHT) for each channel (phone, e-mail, instant messaging), expressed in whole minutes. It is calculated by the price the contractor indicates in the tender for one minute of work, multiplied by the AHT.

From the start the AHT is set as specified in the table below. After three months of running service, the price per enquiry per channel can be adapted to the real AHT, as measured according to the reporting requirement in section 3.2.

For every period of three months of operation the contractor and DG Communication can agree to adapt the contractual AHT used for pricing in order to align with the real AHT. DG Communication can, in addition to the reported real AHT, make enquiries into the efficiency of the time use of the contractor and take this into account. The range within which the AHT can be aligned is capped by the figures shown in the table.

| Channel | Contractual AHT at the start of the operations (minutes) | Minimum contractual AHT (minutes) | Maximum contractual AHT (minutes) |
|---|---|---|---|
| Phone | 10 | 5 | 12 |
| Email | 10 | 5 | 12 |
| Chat | 10 | 5 | 12 |
| Manual handling of obsolete cases, irrespective of channel (registration as obsolete, but no reply) Cf. section 1.5.1.b | 1.5 | 1.2 | 1.8 |
| Identical e-mail replies to chain letters (detection of related cases, preparation of one single reply, sending this to all the enquiries) Cf. section 1.5.1.f | 4 | 3.5 | 4.5 |

### 7.1.3 Bonus-malus for key performance indicators

The key performance indicators as specified in section 3.1 are used for a bonus-malus system that can impact the monthly payment between 90% and 105%. Details are provided below in section 7.3.

### 7.1.4 Minimum payments

The contractor is guaranteed a minimum payment that corresponds to 80% of the forecasted number of enquiries, which is agreed between the contractor and DG Communication on a monthly basis. Details of the forecast requirement is given in section 1.11.

## 7.2 Activities paid within or outside the price per enquiry

### 7.2.1 Basic price paid for answering enquiries

The price paid for each answered enquiry covers:

a. all activities related to the original enquiry, including a possible reply via a different channel, work related to escalations to back offices, as well as registration activities;

b. all costs required to render the service, i.e. operational costs, project coordination, training, knowledge management, IT and communication tools, reporting, etc.;

c. all hand-over procedures at the end of the contract (section 6.2.6).

### 7.2.2 Costs paid separately

Only the following costs are paid separately:

a. a flat rate for the cost of the four months of the **pre-deployment** in the phase-in period. This covers all tasks foreseen in section 6.2.3. This flat rate will be paid in three parts:

   i. an advance of 30% upon signature of the contract;

   ii. an interim payment of 40% upon start of operations;

   iii. the remaining 30% after the four months running-in period (6.2.4), when the normal level of KPIs is achieved.

   Please also refer to Art. II.15 of the framework contract on the application of liquidated damages in case of delay in delivery.

b. a flat rate for **extraordinary opening** on weekends, beyond the three weekends for each calendar year, as foreseen in section 1.4;

c. a flat rate amount for one-off adaptations of operations and IT systems in case a **new language and/or EU Member State** is introduced during the contract period, c.f. section 5.7;

d. work of liaison officers, cf. section 2.2.3;

e. work related to adaptations of the knowledge management system at the **request of DG Communication** during the contract period (adaptation to interoperate with other Commission databases or AI systems, or other IT developments, which are requested by DG Communication, and which cannot be considered as a normal part of operating a modern contact centre). The contractor will paid for these modifications at the unit price of work per day of the profiles mentioned in the price list. The same applies to other requests by DG Communication for extra work that falls within the purpose of the defined profiles.

## 7.3 Bonus-malus scheme

### 7.3.1 Main principle of the bonus-malus scheme

The contract features a bonus-malus scheme, which adjusts payment prices based on the contractor's performance against KPIs. The aim is to support the contractor to stay on track with quality and performance and to give the contractor a financial incentive to outstanding performance.

The key performance indicators are defined in section 3.1.

The tables below reiterate the target values for each KPI and feature the weighting of each KPI in the calculation of the overall performance of the contractor. The score for each KPI is the outcome compared to the target, expressed in percentage. The overall score is the percentage by which the invoice amount is multiplied. It is expressed with one digit after the decimal point.

The bonus-malus is capped at -10% and +5% percent, i.e. the figure can never be below 90% or above 105%.

The examples below are provided to ease the understanding of the bonus-malus scheme. The figures are rounded.

| | | | | **Example 1** | | |
|---|---|---|---|---|---|---|
| | | **Target**<br>A | **Weight**<br>B | **Outcome**<br>C | **Score compared to target (%)**<br>D<br>= C/A[9] | **Score weight**<br>E<br>= B*D |
| 1) First-level resolution rate (%) | | **95** | 20 | 96 | 1.0 | 20.2 |
| 2) Pick-up time for phone calls (share answered within 30 seconds) | | **80** | 15 | 85 | 1.1 | 15.9 |
| 3) Response time for e-mails (days) and forwarding to back offices | | **1.5** | 15 | 1.3 | 1.2 | 17.3 |
| 4) Quality of replies and of knowledge (score) | | **80** | 30 | 82 | 1.0 | 30.8 |
| 5) Citizens satisfaction (%) | | **80** | 10 | 70 | 0.9 | 8.8 |
| 6) Staff satisfaction (%) | | **80** | 10 | 91 | 1.1 | 11.4 |
| Total | | | 100 | | | 104.3 |

[9] For KPI n° 3, better quality is represented by a lower figure in the outcome. The "score compared to target" is therefore calculated the other way round than for the other KPIs, i.e. as A/C.

| | | | | Example 2 | | |
|---|---|---|---|---|---|---|
| | | Target | Weight | Outcome | Score compared to target (%) | Score weight |
| | | A | B | C | D =C/A | E =B*D |
| 1) First-level resolution rate (%) | | **95** | 20 | 94 | 1.0 | 19.8 |
| 2) Pick-up time for phone calls (share answered within 30 seconds) | | **80** | 15 | 80 | 1.0 | 15.0 |
| 3) Response time for e-mails (days) and forwarding to back offices | | **1.5** | 15 | 1.6 | 0.9 | 14.1 |
| 4) Quality of replies and of knowledge (score) | | **80** | 30 | 78 | 1.0 | 29.3 |
| 5) Citizens satisfaction (%) | | **80** | 10 | 80 | 1.0 | 10.0 |
| 6) Staff satisfaction (%) | | **80** | 10 | 70 | 0.9 | 8.8 |
| Total | | | 100 | | | 96.9 |

In example 1, the contractor overperforms by 4.3 points. A bonus of +4.3% will be added to the invoiced amount.

In example 2, the contractor underperforms by 3.1 points. A malus of -3.1% will be deducted from the invoiced amount.

### 7.3.2 Persistent performance below target

If, for any given KPI, the contractor **underperforms below the target** for three consecutive months or more, DG Communication may apply a penalty of up to -3% (minus three per cent) on the original invoice, in addition to the bonus-malus scheme.

In example 1 above, the KPI 5 for citizens satisfaction is below the target value. If this happened also during the two preceding months, DG Communication could decide to apply an additional penalty of -3% on the invoice, on top of the +4.3 % bonus. This would result in an overall bonus of +1.3%. The penalties are applied by subtracting the value of the penalty in percentage points from the overall bonus/malus result, e.g. for example 1 above: 104.3 - 3 = 101.3 which is applicable to the total of the invoice.

### 7.3.3 Performance per language

For KPI 2 (phone pick up time) and KPI 3 (email response time), the following rule applies: If the outcome **for five or more of the EDCC languages are under the following minimum acceptable**

**outcom**e, then the average of the outcome for these languages is used in the bonus-malus calculation, instead of the average for all EDCC languages.

a. KPI 2, phone pick up time: The minimum acceptable outcome is 72% of calls answered within 30 seconds;

b. KPI 3, e-mail response time: The minimum acceptable outcome is 1.65 days.

DG Communication will take due consideration of any legitimate argument provided by the contractor before deciding on such a penalty.

### 7.3.4 Adjustment of KPI targets

If the contractor overfulfills a KPI for three months in a row, then the KPI target is modified to the average of the outcome in those three months.

The KPI targets cannot be lowered to make them less stringent for the contractor.

# 8 Annexes

## 8

Annex 1: 2023 annual activity report for the Europe Direct Contact Centre

Annex 2: EDCC charter: principles for operating back offices within EU departments

Annex 3: Style guide for writing EDCC replies

## Appendix - Examples of questions the Europe Direct Contact Centre are expected to reply to

**First-level enquiries**

(to be replied directly by the contact centre staff)

- I would be grateful to know whether there is any official acknowledgement of degree equivalence between Germany and Spain.
- Can the hospital get funding for a scientific exchange of modern geriatrics? Does the EU help in establishing contacts with other medical facilities?
- I would like to clarify certain issues with regard to application for Erasmus+ as an organisation. I read the guide and the information provided on europa.eu and I have some questions.
- I will soon move from Romania to Germany because of a job. Do I need to register somewhere?
- I would like to know if parental authorisation is needed for the departure of a 14-year-old boy with his aunt on a flight to Paris.
- Hello, I want to know what procedures I must follow to be able to work in Portugal, as a cross-border worker three days a week and then three days in Spain. Could you tell me if there are forms for this case and what they are?
- We are a primary aluminium company, looking to start trading aluminium scrap in Europe. We have some questions, and we were wondering if you could help us.
- I made a purchase from Spain. I paid 30 euro, but they did not send me the good for a month.
- I have officially retired in Bulgaria and receive pension for pensionable service and age. I am currently in Germany where I work on an employment contract. Will I obtain the right to receive German pension from the German insurance institute when I have worked for 4 years in Germany?
- I am doing my Erasmus, and I went to the hospital, but I did not have the EHIC with me. How can I ask for the reimbursement?
- We are a young team that works on a device that would make a life of elderly and disabled people better and would increase their security by allowing them to call for help immediately in case of emergency. We would like to receive a financial support and assistance from you in order to place this product on the internal market.
- I am looking for information on hiring a Sales Professional for our company within the EU. Are there more guidelines or someone to work with directly?
- I am writing a research paper about European Migration Policy. I would like to talk with you about how European Union works to better understand which are the mechanisms and to understand what remains to be done in migration policy areas.
- Where can I find the information about how social media moderates the content, as they are supposed to publish?
- I cannot download the Discover Europe train ticket which I have been awarded.
- I cannot find a job in Italy. Social services are not working!
- It concerns the conflict between Ukraine and Russia. In my opinion, the approach to the conflict should be changed. Ukraine and Russia should seek a peaceful solution.
- My flight was delayed. What can I do?
- I have a question about cross-border inheritance – will I have to pay taxes in Hungary as well on inheritance from Germany?

- I am treated differently than Spanish nationals because I am a Dutch national. I am discriminated by the public authority.
- How does the EU define propaganda and disinformation?
- Can Ukrainian refugees who have temporary protection and a residence permit in an EU country travel within the EU? For how long? What documents do they have to provide?
- I want to work for JRC in Ispra, how can I send them my CV?
- I have found that some webpages ask for money to avoid cookies. Is that legal? Where can I complain?
- Under DSA traders need to indicate their contact information, I am an independent trader and not a company, my contact information is my home address, this is a breach of my privacy, how is this legal?
- Hello, I received a S1 document in Belgium because I am invalid, and I am looking to register with a health insurance fund to fill in this form in Portugal. Can you help me please?
- Do citizens from Brazil need a visa in order to enter the EU?
- I am from Colombia, and I am interested in immigrating with my family to a country in Europe, thank you in advance if you could guide us.
- It is not a question. Stop banning petrol chainsaws and lawnmowers and internal combustion cars, motorbikes and scooters from 2025!!!!!!!!!!!!!!!!!! If you don't, we the lovers of the internal combustion engine will put you out of a job and out power!!!

**Second-level enquiries**

(to be escalated to associated services)

- When can we expect the call for research in circular economy?
- What exactly did the President of the Commission mean when she said the Commission shows full solidarity with the victims of the recent flooding?
- My company produces devices for heating and air-conditioning. We need some clarifications on EU regulation 2015/1188.
- Hello, I was wondering to what extent the right to work, and to get paid for work done, is monitored and enforced.
- Hello, I am a beneficiary of EU EDF, but I never receive any funds I would like to know why or some information on that subject please, I am from South Africa so please let me know.
- Is there a European model of a value chain for the green hydrogen? I would also like to know if there is a value chain model for the industrial sector.
- I ask for clarification regarding the PNRR (national recovery and resilience plan) funds intended for the hiring of Italian teachers: our politicians claim that they have been somehow obliged by specific agreements stipulated with the European Union to hire new resources through ad hoc competitive procedures and that, in no case, those funds can be used to hire personnel present in rankings of previous competitions. Is this true?
- We have received a payment from the European Commission, but we do not know in relation to what? Can this be clarified for audit and accounting purposes?