



FWC EIGE/2023/OPER/05 - Lot 1 and 2

TENDER SPECIFICATIONS

Gender Equality Index in the EU Member States:
policy context and statistical analysis

OPEN PROCEDURE – FRAMEWORK CONTRACT FOR SERVICES

These Tender Specifications provide instructions and guidance to tenderers about the nature of the Offer they should submit and serve as the contractor's mandate throughout the project implementation. The purpose of the Specifications is to ensure that the project is properly conceived by the contractor, that the work is carried out on schedule and that resources will not be wasted. The Tender Specifications will become part of the framework contract that may be awarded as a result of this tender.

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SUMMARY

Contracting Authority	The European Institute for Gender Equality (EIGE)
Procedure	Call for tender – Open procedure - Framework Contract for Services
Purpose	EIGE seeks to conclude a framework contract(s) with professional company/ies capable of providing a wide range of services to support EIGE's work on the Gender Equality Index.
Lots	Lot 1 - Gender Equality Index - data and policy analysis for the EU and Member States Lot 2 – Statistical analysis related to the Gender Equality Index
Maximum Volume	Lot 1: € 480,000 Lot 2: € 200,000 The indicated maximum volume is a contractual budgetary ceiling. It does not bind EIGE to purchase for the maximum amount.
Duration	The initial duration of the framework contract(s) shall be 12 months with 3 possible renewals of 1 year.
Contracts	EIGE will sign a single framework service contract per Lot with the successful tenderer/s offering best value for money. A Draft framework service contract is attached.
Submission of offers	Tenderers may submit an offer for one or more Lots. In case a tenderer decides to apply for both Lots, it has to submit separate technical and financial offers for each Lot.
Places of performance	The tasks will be performed on the Contractor's premises or places indicated in the tender. Meetings between the Contractor and EIGE will be held on-line or in EIGE's premises in Vilnius. Upon agreement with the contractor, meetings can be held in other locations in Europe.
Variants	Not permitted
Joint offers	Permitted as announced in article 2.2.1 of these Specifications
Subcontracting	Permitted as announced in article 2.2.1 of these Specifications

1. TECHNICAL SPECIFICATIONS

1.1 GENERAL BACKGROUND

The European Institute for Gender Equality (hereafter referred to as ‘EIGE’¹) is a decentralised agency of the European Union, established to contribute to and strengthen the promotion of gender equality, including gender mainstreaming in all EU policies and the resulting national policies, and the fight against discrimination based on sex, as well as to raise EU citizens’ awareness of gender equality by providing technical assistance to EU institutions, in particular the Commission and the authorities of the Member States.²

EIGE shall develop methods to improve the objectivity, comparability and reliability of data at EU level by establishing criteria that will improve the consistency of information and take into account gender when collecting data.³ Among the main tasks of the Institute are the dissemination of data and information on gender and the facilitation of the exchange of good practices and dialogue among stakeholders in order to raise awareness on gender equality among EU citizens. EIGE’s activities are guided by its multi-annual and annual work programmes (SPDs).

Within its mandate, EIGE developed the Gender Equality Index, which was launched in 2013. Since then, seven editions were published (2013, 2015, 2017, 2019, 2020, 2021, and 2022), annually as of 2019. They cover new trends and developments in gender equality as measured by the Index as well as a thematic focus, which changes each year. The Gender Equality Strategy 2020-2025 recognises the Gender Equality Index as a key benchmark for gender equality and has established an annual monitoring of gender equality, building on the Index⁴. This adds a high political relevance to the annual releases of the Index.

In 2021, for the first time, EIGE collected own EU survey data on gender equality and socioeconomic consequences of the COVID19 crisis, focusing on the issues from a work-life balance perspective. The findings of the survey provided the basis for the thematic focus of the Gender Equality Index 2022. It also showed the potential of surveys to provide data for the Gender Equality Index, which is otherwise hard or impossible to obtain (i.e. old, irregular data in the time domain). In view of the Commission’s commitment to the green transition, the Gender Equality Index 2023 will focus on selected elements of the European Green Deal. In 2023, EIGE will release the data from its first EU-wide survey on gender gaps in unpaid care, individual and social activities. The data will be used for the domain of time, which has not been updated since 2017. Index 2024 will focus on violence against women and will make use of the new prevalence data collected by Eurostat (‘EU survey on gender-based violence and other forms of interpersonal violence’ – EU-GBV) and the joint survey undertaken by EIGE and the European Union Agency for Fundamental Rights (VAW II)⁵.

Since 2010, all Presidencies of the Council of the EU have requested EIGE contributions, increasing the research scope to support decision-making at EU level. As of 2022, the thematic focus of the Gender Equality Index and related policy briefs support the Presidency of the second semester, while reports focusing on BPfA implementation support Presidencies of the first semester. In 2022, EIGE produced a policy brief on *Young women and men in the aftermath of the COVID-19 pandemic*⁶ for the

¹ Established by the European Parliament and of the Council Regulation (EC) No 1922/2006 of 20 December 2006 (OJ L 403/9 of 30.12.2006)

² Article 2, Idem 2

³ Article 3 of the Regulation (EC) No 1922/2006 of the European Parliament and of the Council of 20 December 2006

on establishing a European Institute for Gender Equality

⁴ Home | GENDER EQUALITY STRATEGY Monitoring Portal (europa.eu)

⁵ Gender-based violence: capturing accurate data - Products Eurostat News - Eurostat (europa.eu)

⁶ Young women and men in the aftermath of the COVID-19 pandemic | European Institute for Gender Equality (europa.eu)

Czech presidency of the European Union, and in 2023 will release a policy brief on *Bridging the gender care gap to achieve work-life balance for all* for the Spanish presidency.

The project commissioned through this invitation to tender is undertaken within the scope of EIGE’s 2023-2025 Single Programming Document. It is a part of the Institute’s wider activities aimed at collecting, processing and disseminating data and statistics.

By launching this call for tender, the Institute seeks to conclude a framework contract with professional company/ies capable of providing a large range of services to support EIGE’s work on the Gender Equality Index.

1.1.1. The Gender Equality Index in brief

The Gender Equality Index is a comprehensive measure for assessing the state of art and monitoring progress in gender equality across the EU over time. The Gender Equality Index is an effective tool for communicating the trends in gender equality to a broad variety of stakeholders and users in and beyond the gender equality community. The Gender Equality Index helps to identify strong and weak aspects of the national situation and facilitates inter-country comparisons.

It relies on a conceptual framework that embraces different theoretical approaches to gender equality and integrates key gender equality issues within the EU policy framework. It measures gender equality through a selection of 31 indicators⁷ divided into six core domains (work, money, knowledge, time, power, health). Beyond those domains, the Gender Equality Index also pays attention to intersecting inequalities and violence against women:

- The Index unmasks some of the explicit differences within groups of women and men by accounting for some of the relevant social factors: age, (dis)ability, migrant background (measured by the country of birth), education and family composition, aiming to shed light on intersecting inequalities.
- It uses a composite indicator to measure several aspects of violence against women. This enables the monitoring of the extent of the most common and widely criminalised forms of violence against women (i.e. sexual and physical violence and femicide) across the EU.

As of 2019 EIGE will release the Gender Equality Index and country factsheets annually. Country factsheets summarize the Index results for each Member State. Analysis of country data and information provides a relevant added value of the Gender Equality Index. Tailor-made data analysis supports the interpretation of progress in gender equality in the Member States and is relevant to stimulate the debate in the national context.

The country factsheets of the Gender Equality Index 2013 and 2015 are published in separate publications⁸. The country factsheets of the Gender Equality Index 2017-2022 are available on EIGE’s website, in the section dedicated to the Gender Equality Index⁹.

For the 2021 and 2022 Index releases, EIGE has produced online country factsheets for the Member States and one for the EU. EIGE will continue to apply a digital first approach in its work on the Index country factsheets.

1.1.2. Methodology for calculating the Gender Equality Index

The Gender Equality Index is a measure obtained by compiling individual indicators under six core domains reflecting different aspects of the multidimensional concept of gender equality. The Index

⁷ For more details, see the latest Index methodological report at <https://eige.europa.eu/publications/gender-equality-index-2017-methodological-report>.

⁸ [Gender Equality Index - Country profiles | European Institute for Gender Equality \(europa.eu\)](https://eige.europa.eu/publications/gender-equality-index-2017-methodological-report)
[Gender Equality Index 2015 Measuring gender equality in the European Union 2005-2012 - Country profiles | European Institute for Gender Equality \(europa.eu\)](https://eige.europa.eu/publications/gender-equality-index-2017-methodological-report)

⁹ <https://eige.europa.eu/gender-equality-index/publications>

is a mathematical combination of a set of individual indicators, which aims to provide a summary of a complex reality of gender equality¹⁰. This analysis is further complemented by detailed statistical analysis of intersectionality¹¹ and calculation of a composite measure of violence against women¹².

Measuring gender equality through a single Index raised several empirical challenges during the development phase, principally related to data availability, data quality, selection of variables or aggregation. These challenges were overcome by using a solid methodology based on sound statistical principles, consisting of much more than just the combination of variables. The Gender Equality Index therefore provides a more realistic picture of the global level of gender equality in the EU than the individual variables can do separately.

The computation of the Gender Equality Index is based on the internationally accepted 10-step methodology on building composite indicators developed by the European Commission’s Joint Research Centre (JRC) and the Organisation for Economic Co-operation and Development (OECD) (Nardo et al., 2008).

A number of statistical steps were taken to arrive at the final structure and scores of the Gender Equality Index:

- Descriptive statistics for a broad range of indicators that could potentially be included in the Index.
- Multivariate analysis to select indicators to be included in the Index and assign them to corresponding domains. This analysis relied on two principal methods: cross-correlation analysis and principal component analysis (PCA).
- Analysis of selected indicators included in the Index to calculate gender gaps and metrics to be used in calculation of the Index scores.
- Aggregation of calculated gender gaps and metrics into the overall Index scores, and the scores of its domains and sub-domains. This includes the calculation of final Index scores for each Member State and the EU.
- Robustness analysis to compare results across alternative Index specifications and to ensure that the most reliable specification was chosen. This includes testing for different methods of indicator aggregation, weighting and imputation of missing data in order to select the most robust formula.

The measurement framework of the Gender Equality Index includes the development of both a metric to calculate gender gaps and a methodology to aggregate gender gaps in sub-domains, domains and the Gender Equality Index. It includes the calculation of final scores of the Gender Equality Index for each Member State and the EU. The Gender Equality Index is calculated following several steps.

- Selection of indicators
- Processing indicators

¹⁰ [A detail description of the conceptual framework and the methodology of the Gender Equality Index is provided in EIGE \(2013\) Gender Equality Index: Report. Available at: https://eige.europa.eu/rdc/eige-publications/gender-equality-index-report](https://eige.europa.eu/rdc/eige-publications/gender-equality-index-report)

¹¹ EIGE (2019) *Intersecting inequalities: Gender Equality Index*. Available at: <https://eige.europa.eu/publications/intersecting-inequalities-gender-equality-index>

¹² EIGE (2017) *Gender Equality Index 2017. Measurement framework of violence against women*. Available at: <https://eige.europa.eu/rdc/eige-publications/gender-equality-index-2017-measurement-framework-of-violence-against-women>

- Calculating the gender gap metric
- Calculating the correcting coefficient
- Calculating the final metric
- Aggregating for sub-domain, domain and Index level

The full methodology of the Gender Equality Index is presented in the Methodological Report (2017)¹³.

1.2 SCOPE OF THE PROCEDURE

The scope of this procedure is to provide the Institute of an external support for the analysis of the Index results at EU and country level, for additional outputs that might be needed to further communicate the Index results, and to support the statistical analysis of the Index, including technical support in the updating process of the Gender Equality Index and its components.

More specifically, the Institute would rely on external expertise to produce the statistical analysis of the Gender Equality Index at Member State level and analysis of national policy developments, which will support the interpretation of the Index results. It also includes the production of various communication materials based on such analysis.

EIGE would rely on specific statistical expertise to carry out the additional statistical analysis and to support EIGE in the updating process of the Gender Equality Index and its components. This envisages using advanced statistical techniques to provide additional analytical insights on specific issues, such as convergence in Gender Equality Index scores across the EU or differences in Index scores for specific clusters of countries. Additionally, EIGE would rely on statistical expertise in supporting the Institute to run the methodological updates of the Index.

The geographical coverage of the contract applies to the EU Member States.

The time frame of the current framework foresees the coverage of 1 year which can be extended for 3 more years upon renewal of the contract. The indicative range of services EIGE may require reflects the range of data and policy analysis and communication activities related to the Gender Equality Index.

1.3 OVERALL AND SPECIFIC OBJECTIVES

OVERALL OBJECTIVE

The overall objective is to contribute to stronger evidence based policy-making in the EU and Member States in the area of gender equality by providing the evidence on the major achievements and setbacks as measured by the Gender Equality Index.

SPECIFIC OBJECTIVE(S)

The specific objectives are to support the monitoring of gender equality in the EU and across Member States and to provide contextual analysis of the Index findings to support policy-making in the EU and Member States by producing advanced statistical analysis of the Gender Equality Index in a broader context of the economic, social and policy developments at the EU level. This call for tender is divided into two Lots:

Lot 1 - Gender Equality Index - data and policy analysis for the EU and Member States

Lot 2 - Statistical analysis related to the Gender Equality Index

Below there is a list of activities, tasks and deliverables per lot that the contractor is expected to produce and undertake.

¹³ EIGE (2017) Gender Equality Index 2017. Methodological report. Available at: <https://eige.europa.eu/rdc/eige-publications/gender-equality-index-2017-methodological-report>

1.4 EXPECTED RESULTS

Lot 1 - Gender Equality Index - data and policy analysis for the EU and Member States

Tailor-made data and policy analysis, which supports the interpretation of the increase and/or decrease of gender equality in the Member States, is relevant to stimulate the debate in the national context. Analysis of country data and information, and policy development, is a relevant added value of the Gender Equality Index.

As of 2022, the thematic focus of the Gender Equality Index and closely related topics also support the EU Presidencies of the 2nd semester and might provide basis for the Council conclusions on gender equality in the context of identified EU priorities (if in line with Presidencies’ objectives).

The Gender Equality Index is the driver for the new EU-wide surveys that EIGE has recently carried out, namely the survey on the socio-economic consequences of COVID-19 pandemic in 2021, and the survey on gender gaps in unpaid care, individual and social activities in 2022. The latter is of utmost relevance for the updating, for the first time since 2017, of the domain of time of the Index, and it will be repeated on a regular basis in the following years.

EIGE is also conducting, together with FRA (Fundamental Rights Agency) a survey on violence against women (VAW II), in eight Member States to support the EU-GBV survey coordinated by Eurostat. The data will allow to update the domain of violence and will be further analysed in the thematic focus of the Gender Equality Index 2024 on violence against women.

The purpose of Lot 1 is to support EIGE in developing concise information, data and analysis aiming at contextualizing the results obtained by the Gender Equality Index at country level. It also aims to support EIGE in providing research evidence to Presidencies in the areas closely linked to the Gender Equality Index and its thematic focuses, including the analysis of the past and forthcoming EIGE’s surveys at the EU and Member States level.

EIGE will rely on in-depth, accurate analysis of Index-related data and information and analysis of national policy developments to support the interpretation of the Index results at country level. The activities of Lot 1 will support EIGE in disseminating the results of the Gender Equality Index in the Member States.

RESULT N. 1 - Increased knowledge on the progress of gender quality in the EU and the Member States

DELIVERABLE D 1.1 – The Gender Equality Index: EU and country data analysis

The purpose of the activities and deliverable D 1.1 under the Lot 1 is to provide in-depth quantitative analysis of the Gender Equality Index for the EU and each EU Member State.

The contractor will carry out data analysis necessary for upcoming Index communication products aimed at EU and its Member States¹⁴ and present results from this analysis in a concise, engaging way. This is expected to include a detailed analysis of the Gender Equality Index scores and indicators at EU and Member State level (i.e. country factsheets) and a detailed EU and country-level analysis of data used in the thematic focus of the Gender Equality Index (from sources such as Eurostat, Eurofound, European Commission, EIGE, Cedefop, FRA, OECD, National Statistical Offices or other sources).

The contractor will work in close collaboration with EIGE’s staff, who will provide most of the data required for analysis, such as the Gender Equality Index scores and indicators. EIGE may also provide the contractor with broad templates and guidelines for reporting analytical results, such as types of

¹⁴ For detailed description of these products, see Deliverable 1.4.

required charts/tables or a list of requested data analysis disaggregation. The contractor may be asked to obtain and analyse additional data beyond what was provided by EIGE.

The contractor should carry out a quantitative state of play and trend analysis of the Gender Equality Index components (Index, domains, sub-domains and indicators, including intersecting inequalities and violence against women), and analyse the selected indicators of the Index thematic focus at EU and Member State level. The contractor should also produce Excel files for each Member State and the EU, which should contain all data and indicators, used for the EU and country analysis reports.

The contractor should be able to analyse microdata of the main EU-wide surveys, including EIGE's surveys, when requested. The contractor should be also in the capacity to ask and obtain such microdata from the EU providers, namely Eurostat among others.

The activities under Deliverable D 1.1 will require advanced understanding of quantitative data analysis and deep knowledge of gender equality issues and developments at national level. It is expected that the activities will draw on expertise of both national researchers (one per Member State) and senior statisticians.

N	Activities D 1.1 The Gender Equality Index: EU and country data analysis
1.1.1	To carry out quantitative analysis of data from a range of sources (mostly provided to contractor by EIGE), including descriptive statistics, cross-tabulations, comparative analysis, etc. at national and/or EU level
1.1.2	To draft analytical results in concise, engaging way at national level (i.e. country factsheets) for all Member States or a selection of them, and the EU
1.1.3	To produce outputs of statistical analysis (such as charts, tables or short descriptions) requested by EIGE for its communication products
1.1.4	To obtain/collect data from relevant data sources at national and/or EU level as necessary (relying on already collected data, no primary data collection is expected under this activity)
1.1.5	To obtain/collect and analyse microdata at Member State and/or EU level, including EIGE's survey microdata
1.1.6	To produce detailed documentation of the analysis undertaken, such as Excel files in which analysis was performed or SPSS syntax/Stata do-files/R-scripts used to generate results

Provisional timelines: The contractor is expected to deliver the country analysis in a period up to 20 (twenty) weeks, approximately, after the signature of a Specific Contract following a Request for Service (RS).

DELIVERABLE 1.2 – Policy and contextual analysis at EU and Member State level

The purpose of the activities and deliverable D 1.2 is to support the interpretation of the Gender Equality Index by analysing additional information on gender equality related policy, legal, economic and social developments at national level.

The contractor will collect and analyse information on selected policy/legal/economic/social developments and gender equality issues that will provide context for Gender Equality Index results at national level. This analysis should primarily rely on desk research but may also require contacting

relevant organisations and authorities for additional information. The contractor will present results of the analysis in a concise and engaging way in short summaries, notes or other similar formats.

For example, the contractor may be asked to explore possible causes of a sharp increase/decrease in Index scores for the EU Member States or a specific group of countries, or to provide policy context to certain aspects of the thematic focus of the Gender Equality Index.

The contractor will work in close collaboration with EIGE’s staff, who might provide guidance on what type of analysis is required as well as some relevant underlying data/information. EIGE may also provide the contractor with broad templates and guidelines for reporting analytical results, such as a structure of short analytical notes or text boxes.

The activities under D 1.2 will require advanced knowledge and expertise in gender equality policies, legal framework, economic and social developments at national level. It is expected that the activity will draw on expertise of both national researcher (one per Member State) and senior researchers in gender equality.

N	Activities D 1.2 Policy and contextual analysis at EU and Member State level
1.2.1	To identify and collect information on selected policy, legal, economic and social developments/indicators relevant for the interpretation of the Gender Equality Index results (for all the Member States or a selection of them)
1.2.2	To obtain/collect and analyse data/indicators and qualitative information from the main EU policy databases, such as LMP, MISSOC databases, etc. (for all the Member States or a selection of them)
1.2.3	To analyse collected information from national and gender equality perspectives (for all the Member States or a selection of them)
1.2.4	To produce outputs of analysis of selected policy, legal, economic and social developments and their impact on gender (in)equalities (such as short summaries, case studies or good practice examples) requested by EIGE for its communication products (for all the Member States or a selection of them)
1.2.5	To produce outputs of analysis (such as charts, tables or short descriptions) requested by EIGE for its communication products
1.2.6	To draft brief analytical notes describing analysis carried out, its main results, and information collected
1.2.7	To provide detailed documentation of the analysis undertaken, such as mapping of reviewed developments, or list of references used in the analysis

Provisional timelines: The contractor is expected to deliver the country analysis in a period up to 16 (sixteen) weeks, approximately, after the signature of a Specific Contract following a Request for Service (RS).

DELIVERABLE 1.3 – Policy brief

The purpose of these activities and deliverable D 1.3 is develop policy briefs in support to the EU presidency of the EU, mainly based on the analysis of the Gender Equality Index and its thematic focus, including EIGE’s surveys used to complement the analysis of the Gender Equality Index.

As of 2022, the Gender Equality Index and its thematic focus provided evidence to support political priorities of the EU Presidency of the second semester. In 2022, EIGE has produced a policy brief on *Young women and men in the aftermath of the COVID-19 pandemic*¹⁵ for the Czech presidency of the European Union, and in 2023 will release a policy brief on *Bridging the gender care gap to achieve work-life balance for all* for the Spanish presidency.

The contractor will draft policy briefs drawing on data, analysis and findings of the Gender Equality Index and its thematic focus in a clear and engaging way accessible to a broad range of readers. The contractor may be requested to carry out statistical analysis of the EU wide data and microdata, including EIGE's surveys, to support the analysis. The contractor might be asked to obtain microdata for the EU Member States from different data providers (Eurostat, Eurofound, FRA among others). The policy brief

Each policy brief will follow EIGE's template¹⁶ and will have the following structural parts:

- Title;
- Executive summary - three to five (3-5) bullet points, presenting the core findings and policy advice jointly/integrated;
- Evidence/rationale for action. The main part of the brief, elaborating the problem: developing the core issues and striking facts/figures that showing the novelty of research, and pointing to the most striking findings;
- Policy recommendations.

The contractor will work in close collaboration with EIGE's staff to agree on the structure, content and layout of the policy briefs. EIGE will review the policy briefs and provide feedback, which then will be addressed by the contractor.

The policy brief will be prepared in English and follow EIGE's style guide and writing guide for publications¹⁷.

The contractor will be required to engage experienced language editor to ensure the highest quality of English language of the deliverables submitted to EIGE.

The nature of the work for this deliverable might be highly technical and require an excellent command of microdata elaboration, and, possibly, a good understanding of a broad range of advanced methods for statistical analysis, such as multivariate regression analysis, cross-correlation analysis, cluster analysis and other methods. The activities are expected to rely heavily on the expertise of senior statisticians.

N	Activities D 1.3 Policy brief
1.3.1	To develop a methodological proposal (scope, concept, political relevance, data sources, methods of analysis) of the policy brief
1.3.2	To identify and collect information on EU and/or national topics, policies and legal developments relevant for the interpretation of results
1.3.3	To carry out the analysis of data, including microdata at Member State and EU level and EIGE's survey microdata

¹⁵ Young women and men in the aftermath of the COVID-19 pandemic | European Institute for Gender Equality (europa.eu)

¹⁶ EIGE will share relevant templates with the contractor at the inception meeting.

¹⁷ <http://eige.europa.eu/about-eige/documents-registry/eige-style-guide>
[EIGE writing guide](http://eige.europa.eu/about-eige/documents-registry/eige-writing-guide) | European Institute for Gender Equality (europa.eu)

1.3.4	To draft policy brief(s) describing analysis carried out (including charts, tables and other visualisations), its main results, and information collected
1.3.5	To produce detailed documentation of the analysis undertaken, such as Excel files in which analysis was performed or SPSS syntax/Stata do-files/R-scripts used to generate results

Provisional timelines: The contractor is expected to deliver a first draft of the policy brief by 4-6 weeks after the signature of a Specific Contract following a Request for Service. The final version of the policy brief is expected by 12-16 weeks after the signature of a Specific Contract following a Request for Service.

DELIVERABLE 1.4 – Communication materials

The purpose of these activities and deliverable D 1.4 is to support EIGE in developing communication materials based on the findings of the Gender Equality Index and/or its thematic focus.

The contractor will draft communication products presenting the Gender Equality Index and/or its thematic focus at the EU and national level. This work will draw on analytical findings from Deliverable 1.1, 1.2 and/or 1.3, presenting them in a clear and engaging way accessible to a broad range of readers. The communication materials will be written in a way that is easy and clear for non-experts to understand.

The contractor will work in close collaboration with EIGE’s staff to discuss and agree on the structure and layout of the communication materials. In some cases, EIGE may provide precise templates and guidelines to be used to develop communication materials. EIGE will also review the communication materials developed by the contractor and provide feedback, which the contractor will be expected to address.

The communication materials will be prepared in English and follow EIGE’s style guide and writing guide for publications¹⁸.

The contractor will be required to engage an experienced language editor to ensure the highest quality of English language of the deliverables submitted to EIGE.

N	Activities D 1.4 Communication materials
1.4.1	To produce short analytical summaries/notes presenting selected findings related to the Gender Equality Index to be published by EIGE, for example, findings related to the thematic focus of the Gender Equality Index in the EU Member States or national policy developments
1.4.2	To produce Gender Equality Index country factsheets for each EU Member State and for the EU ¹⁹
1.4.3	To produce short descriptions for the Gender Equality Index country webpages
1.4.4	To produce other communication materials to support public presentations of the Gender Equality Index, such as Power Point presentations or highlights to be presented on the Gender Equality Index webpage
1.4.5	To provide English proof-reading and editing of the outputs

¹⁸ <http://eige.europa.eu/about-eige/documents-registry/eige-style-guide>
[EIGE writing guide | European Institute for Gender Equality \(europa.eu\)](#)

Provisional timelines: The contractor is expected to deliver the requested output approximately by 4-6 weeks and up to 20 weeks after the signature of a Specific Contract following a Request for Service.

Lot 2 - Statistical analysis related to the Gender Equality Index

The purpose of Lot 2 is to provide technical support to EIGE in producing advanced statistical analysis of the Gender Equality Index in a broad context of the economic, social and policy development at the EU level. The analysis should provide evidence-based results for policy-making based on advanced analytical and statistical methodologies and tools.

RESULT N. 1 - Increased knowledge on the state of play of gender equality as measured by the Gender Equality Index

DELIVERABLE 1.1 – Statistical analysis related to the Gender Equality Index and other contextual indicators

The purpose of these activities and deliverable D 1.1 under Lot 2 is to provide technical support to EIGE in producing additional statistical analysis of the Gender Equality Index.

The contractor might be asked to develop, pilot and/or perform advanced statistical analysis addressing specific analytical issues related to the Gender Equality Index, such as:

- Convergence analysis of the Gender Equality Index scores across EU countries;
- Differences in Gender Equality Index scores for clusters of countries based on pre-defined criteria;
- Analysing intersectionality data with different methods, including econometric modelling;
- Assessing links between the Gender Equality Index and other similar indices or other social and economic indicators.
- Analysing the key drivers of the different levels of gender equality across the EU Member States.
- Forecasting the Gender Equality Index scores.

The contractor will work in close collaboration with EIGE’s staff, who will provide data required for the analysis, such as the Gender Equality Index scores and indicators. In some cases, the contractor may also be asked to collect/obtain and analyse additional data.

The nature of the work for this deliverable is highly technical and will require good understanding of a broad range of advanced methods for statistical analysis of data, such as multivariate regression analysis, cross-correlation analysis, convergence analysis, cluster analysis, modelling and other quantitative methods. The activities are expected to rely heavily on the expertise of statisticians.

N	Activities D 1.1 Statistical analysis related to the Gender Equality Index and other contextual indicators
1.1.1	To undertake statistical analysis to answer specific analytical questions related to the Gender Equality Index, such as convergence of Index scores, clustering of countries or forecasting gender equality levels.

1.1.2	To develop and assess feasibility of and/or pilot proposed statistical methodologies for additional statistical analysis, such as linking the Gender Equality Index with other social and economic indicators or analysing intersectionalities.
1.1.3	To draft statistical/methodological notes describing analysis carried out, its main results, data used and its quality; statistical methodologies proposed; results of feasibility assessments/pilots of proposed statistical methodologies
1.1.4	To present analytical results in a concise, engaging way (e.g. brief statistical notes; sets of tables/charts)
1.1.5	To obtain/collect data from relevant data sources at national and/or EU level as necessary
1.1.6	To obtain/collect and analyse microdata at Member State and EU level
1.1.7	To produce quality assessment of obtained data, taking into account the quality criteria established within the European Statistical System
1.1.8	To produce detailed documentation of the analysis undertaken, such as Excel files in which analysis was performed or SPSS syntax/Stata do-files/R-scripts used to generate results

Provisional timelines: The contractor is expected to deliver the requested output approximately by 4-6 weeks and up to 20 weeks after the signature of a Specific Contract following a Request for Service. Access to, and elaboration of microdata could extend the time for the deliverables.

DELIVERABLE 1.2 - Statistical support to update the Gender Equality Index

The purpose of these activities and deliverable D 1.2 under Lot 2 is to provide technical support to EIGE in the updating process of the Gender Equality Index and its components.

The contractor might be asked to develop, pilot and/or perform advanced conceptual and statistical analysis, data elaboration, and technical proposals to update the Index and its components.

The contractor might be asked to:

- Analyse the selected indicators included in the Gender Equality Index and building metrics to be used in calculation of the Gender Equality Index scores;
- Analyse different normalisation methods to be applied to the original indicators;
- Analyse the current aggregation methods and provide alternative solutions to aggregate the indicators and scores at sub-domain, domain, and Index level;
- Analyse the current weighting system used to aggregate indicators, sub-domain and domains to get the final score of the Index, and propose alternative weighting systems and methods of collecting weights;
- Analyse the current correcting coefficient system applied to the Index, and provide suggestions on different concept and measure to correct the gender gaps in the indicators by the level of achievement;
- Analyse the confidence intervals of the Index, domains, and subdomains scores by Member State;
- Assess breaks in time series and propose linkages;
- Provide technical support for the calculation of the Gender Equality Index indicators (including intersecting inequalities) and scores (for instance, providing syntaxes/do-files/script to implement calculations of the Index and intersecting inequalities);
- Validate EIGE’s calculations by review and/or re-computation,

- Provide feasibility analysis of methodological innovations in measurement of gender equality, for instance twin indices;
- Provide feasibility analysis of computing the Gender Equality Index through microdata, exploring the statistical matching of the most relevant sources;
- Explore further capacities of the Gender Equality Index to monitor gender equality developments at regional/local levels.

The contractor could be also expected to carry out in-depth assessment of various methodological issues related to calculation and analysis of the Gender Equality Index, provide proposals on methodological revisions based on this assessment or to carry out a feasibility analysis of a new type of statistical analysis in relation to the Gender Equality Index.

For example:

- Descriptive statistics;
- Estimation of missing data;
- Multivariate analysis;
- Weighting systems analysis, including the Analytic Hierarchy Process (AHP)
- Uncertainty and sensitivity analysis;
- Breaks in time series analysis.

The contractor will work in close collaboration with EIGE’s staff, who will provide data required for the analysis, such as the Gender Equality Index scores and indicators. In some cases, the contractor may also be asked to collect/obtain and analyse additional data, including microdata from the main providers (Eurostat, Eurofound, FRA, Cedefop, among others).

The nature of the work for this deliverable is highly technical and will require good understanding of a broad range of advanced methods for statistical analysis of data, such as multivariate analysis, regression analysis, convergence analysis, cluster analysis, uncertainty and sensitivity analysis and other statistical methods. The activities are expected to rely heavily on the expertise of statisticians.

N	Activities D 1.2 - Statistical support to update the Gender Equality Index
1.2.1	To undertake statistical analysis to answer specific analytical questions related to the Gender Equality Index and its components.
1.2.2	To draft dedicated statistical reports presenting additional statistical analysis of the Gender Equality Index and its methodology (e.g. multivariate analysis, uncertainty and sensitivity analysis).
1.2.3	To develop and assess feasibility of and/or pilot proposed statistical methodologies for additional statistical analysis
1.2.4	To draft statistical/methodological notes describing analysis carried out, its main results, data used and its quality; statistical methodologies proposed; results of feasibility assessments/pilots of proposed statistical methodologies.
1.2.5	To present analytical results in a concise, engaging way (e.g. brief statistical notes; sets of tables/charts).
1.2.6	To obtain/collect data from relevant data sources at national and/or EU level as necessary.
1.2.7	To obtain/collect and analyse microdata at Member State and EU level.

1.2.8	To produce quality assessment of obtained data, taking into account the quality criteria established within the European Statistical System.
1.2.9	To produce detailed documentation of the analysis undertaken, such as Excel files in which analysis was performed or SPSS syntax/Stata do-files/R-scripts used to generate results.
1.2.10	To verify the accuracy of EIGE's calculations by reviewing them and/or replicate them

Provisional timelines: The contractor is expected to deliver the requested output approximately by 4-6 weeks and up to 20 weeks after the signature of a Specific Contract following a Request for Service. Access to, and elaboration of microdata could extend the time for the deliverables.

DELIVERABLE 1.3 – Communication materials

The purpose of these activities and deliverable D 1.3 is to support EIGE in developing communication materials presenting additional statistical analysis of the Gender Equality Index in context.

The contractor will draft communication products presenting advanced statistical analysis of the Gender Equality Index, such as dedicated statistical reports/notes. This work will draw on analytical findings from Deliverables 1.1 and Deliverable 2.2 under this lot, presenting them in a clear and engaging way accessible to a broad range of readers (citizens, policy makers, media, among others).

The contractor will work in close collaboration with EIGE's staff to discuss and agree on the structure and layout of the communication materials. In some cases, EIGE may provide precise templates and guidelines to be used to develop communication materials. EIGE will also review the communication materials developed by the contractor and provide feedback, which the contractor will be expected to address.

The communication materials will be prepared in English and follow EIGE's style guide for publications²⁰.

The contractor will be required to engage experienced language editors to ensure the highest language quality of the deliverables submitted to EIGE (in English).

N	Activities D 1.3 Communication materials
1.3.1	To produce short statistical notes/summaries presenting highlights from statistical analysis for the Gender Equality Index webpage
1.3.2	To produce short summaries/notes presenting updates of the Gender Equality Index methodology and/or additional statistical analysis
1.3.3	To produce other communication materials to support public presentations of the Gender Equality Index, such as Power Point presentations or highlights to be presented on the Gender Equality Index webpage
1.3.4	To produce other outputs of statistical analysis (such as charts, tables or short textual descriptions) requested for EIGE's communication purposes
1.3.5	To provide English proof-reading and editing of the outputs

Provisional timelines: The contractor is expected to deliver the requested output approximately by 4-6 weeks and up to 20 weeks after the signature of a Specific Contract following a Request for Service. Access to, and elaboration of microdata could extend the time for the deliverables.

²⁰ <http://eige.europa.eu/about-eige/documents-registry/eige-style-guide>

Communication with EIGE (applicable for both lots)

To ensure efficient communication with EIGE, the contractor will be required to exchange information with EIGE by telephone calls, emails, production of required outputs and meetings on regular basis. This applies to Lot 1 and Lot 2.

At the beginning of the Framework Contract(s), the contractor will be required to:

- Attend an Inception meeting, to be held in Vilnius or online within the first 2 weeks after signature of the Framework Contract, with the aim to establish a clear and fair collaboration between EIGE and the contractor. The inception meeting will aim at clarifying and fine-tuning all the potential tasks and deliverables required, and setting the details of collaboration. The project manager and the senior staff from the Contractor’s team shall attend the meeting; and
- Based on the agreements reached during the Inception meeting, the Contractor will draw up an Inception report, which is to be submitted to EIGE for approval within 5 working days after the meeting. The inception report will present the updated organisation of work, planning and timeline for all activities of the project within the contractual deadline.

Throughout the Framework Contract, EIGE shall request services (RS), depending on needs and resources. Each request for services will require the following communication activities:

- Once a request for services is issued, the contractor will prepare a technical proposal that presents detailed methodology, organization of work, planning and timeline for requested services.
- The contractor will then attend an Inception meeting held in Vilnius or online within 2 to 4 weeks after submission of the proposal. This meeting will allow EIGE and the contractor to discuss proposed methodology, work organization and timing and agree on potential refinements and updates. The project manager and senior staff from the Contractor’s team shall attend the meeting.
- Based on the agreements reached during the inception meeting, the contractor will prepare an inception report summarizing any updates to methodology, organization and timing of the work to deliver requested services. This report will be submitted to EIGE within 5 to 10 working days after the inception meeting.
- At the end of the request for services, the contractor will submit a final report covering all requested services. The final report will document the work implemented during the duration of the request for services, in line with the methodology proposed and agreed during the inception meeting and reported in the inception report.

EIGE may also require the contractor to participate in up to, but not limited to, two (2) expert meetings per Lot held at EIGE’s premises throughout the duration of the contract. This would typically require participation of the project manager and/or a key senior researcher.

Participation in meetings including travel, accommodation and any other cost must be covered by the Framework Service Contract and included as a service in the Price Offer.

1.5 DETAILS ON DELIVERABLES/SERVICES (APPLICABLE FOR BOTH LOTS)

Details of the deliverables

All deliverables must be written in a clear and simple way, providing information and analysis that can be understood by non-specialists. They shall be in Word format. The format of the annexes may vary depending on the type of information presented. The EU’s interinstitutional guidelines on abbreviations, country order, referencing, text layout and etc. must be adhered to. <https://publications.europa.eu/code/en/en-000100.htm>

The final versions of all deliverables must be proofread. The documents must be delivered in an appropriate layout and they shall contain visual elements (e.g. tables and graphs). The rules on visual style can be referenced in EIGE Style Guide: <https://eige.europa.eu/about/documents-registry/eige-style-guide-2019>

If graphs/infographic elements are used, they should be provided in editable formats, for example: Word, Excel, Adobe Illustrator, InDesign.

All deliverables must be revised by the contractor according to the Institute’s comments and recommendations, as necessary, and returned within the deadline mentioned in the contract. Some activities must run simultaneously to ensure smooth operation of the project within the given timeframe.

EIGE will have the exclusive rights to publish the results of the study. The contractor must ensure that there are no restrictions on confidentiality and/or intellectual property rights by any third party. In case third-party copyrights need to be obtained, the contractor is expected to do so on behalf of EIGE.

EIGE reserves the right to ask the contractor to specifically list and provide completed tasks by subcontractors, or other entities in the contract.

The following procedure for approval of the deliverables will be applied (if not foreseen differently for specific deliverables).

EIGE receives the deliverable by the contracted deadline. The deliverable is evaluated based on the requirements of the technical specifications. Further actions, which in the opinion of EIGE, would be necessary for the approval of the deliverable will be implemented by the contractor without delay. A revised deliverable which takes into account EIGE’s comments and suggestions will be re-submitted to EIGE within the agreed deadline, but not later than within 10 working days. The deliverable is considered as a final deliverable only after it is approved by EIGE.

Depending on the methodology proposed by the contractor for the provision of services, the activities might change but any deviation is subject to agreement with EIGE. Often, the performance of the activities is not expected to be sequential. On the contrary, some of the activities may require feedback cycles and will be performed in parallel.

For each request for services (RS) EIGE will provide the contractor with a detailed list of requirements. Specific length of each output and/or deliverable will be provided in the specific request for service. The list of tasks and activities is indicative and, in case of urgent matters, may be modified. The contractor will then submit a detailed price offer based on these requirements.

1.6 INPUT BY THE CONTRACTING AUTHORITY (APPLICABLE FOR BOTH LOTS)

EIGE will work closely together with contractor, in order to provide timely all information necessary to effectively implement the foreseen tasks and to develop deliverables consistent with EIGE’s qualitative and style standards.

In particular, EIGE will support the contractor, by sharing information about:

- EIGE resources and findings on similar studies and tools;
- EIGE’s templates;
- EIGE’s online infrastructures (web, Teams, among others);
- Accreditation letter on behalf of EIGE, to contact and inform stakeholders about the aim of the study and about the tasks;
- Contact person as project manager as well as for specific activities (Communication).

1.7 GENERAL GUIDANCE (APPLICABLE FOR ALL LOTS)

The offer should present how the contractor intends to implement the activities and/or services planned and how those activities will contribute to the achievement of the expected results.

1.8 PROJECT TEAM

The organisation of the project team is a key feature and it is fundamental to delivering the expected results within the defined timeframe.

The required experience of the team members should be explicitly reflected in their CVs, which are to be included in the tenderer’s offer (as referred in these Tender Specifications). Tenderers need to ensure that the team have a sufficient number of members, fulfils the requirements listed below in terms of qualifications and experience.

The tenderer is advised and encouraged to ensure stability of the project team, especially of the core research team. EIGE would like to ensure that the project team agreed during the inception meeting would remain for the duration of the project as its members are also responsible for the success and good quality of the final deliverables. In exceptional cases changes in the project team composition may be accepted, but only if similar profile(s) to replace the leaving member(s) are proposed and approval from EIGE is received. If, during the implementation of FWC, EIGE discovers that one or more team members are not capable to carry out that tasks to the required quality standards and in accordance to request for services, EIGE reserves the right to ask the Contractor to replace the team member.

All costs for employing additional experts during the implementation phase of the project are to be borne in full by the contractor.

The project’s core team must include the following profiles.

The team must have a sufficient number of members with the following profiles of professionals and may include further members if needed.

Lot 1 - Gender Equality Index - data and policy analysis for the EU and Member States

A tenderer must ensure that the project team is set-up of, as a minimum, the following profiles:

- Project manager (1) with proven experience in project management and knowledge on gender equality;

- Senior researchers (3) with proven work experience and knowledge on broad aspects of gender equality, such as economy, poverty, education and training, time use, work-life balance, power and decision-making, health, violence against women;
- Senior statisticians (2) with proven experience in statistical analysis of gender disaggregated data and presentation of statistical data;
- One (1) national researcher in gender equality, based in every EU Member State.
- Editor (1) with experience in proofreading, editing, and overseeing the production of texts for publications.

Project manager (1)

The Project Manager will coordinate the project team with overall responsibility for liaising with EIGE and timely execution of the Contract.

The project manager is in charge of the coordination and administrative tasks of the project, as well as being responsible for contacting and informing EIGE about all aspects related to the execution of the contract. The project manager shall provide EIGE with frequent updates on the progress and other relevant aspects of the work. She/he must undertake responsibility for the content and quality of all the deliverables.

<p>Envisaged tasks (non-exhaustive list)</p>	<ul style="list-style-type: none"> - Carry-out overall responsibility for the content and quality of all deliverables; - Follow-up all administrative tasks related to the project; - Plan and manage human and financial resources; - Ensure full cooperation within the team; - Define tasks and activities, coordinate and lead their implementation against time, quality and cost criteria; - Ensure effective and responsible communication and cooperation with EIGE during the entire period of the execution of the contract; - Provide EIGE with frequent updates on the progress of implementation; - Perform risk assessment and risk mitigation during the entire period of the contract; - Participate in all meetings with EIGE and in the experts' meetings related to the project, if necessary; - Sign all the deliverables.
<p>Qualifications and professional experience must include</p>	<ul style="list-style-type: none"> - University degree; - Minimum of five (5) years of professional experience in project management; - Proven experience in research management, as manager or coordinator of at least three (3) major international or European projects (preferably research), each involving at least three countries; - Proven experience of work in the area of gender equality; - Proven experience of analysis, assessment and evaluation of broad range of deliverables; - Excellent knowledge of English (Level C1 based on the Common European Framework of Reference for Languages).

Senior researchers (3)

Senior experts will be responsible for the scientific quality of all deliverables and must approve deliverables before they are submitted to EIGE.

<p>Envisaged tasks (non-exhaustive list)</p>	<ul style="list-style-type: none"> - Lead the research activities within the project in close cooperation with the Project manager and all members of the team; - Develop methodological approach for all research related activities; - Collect and analyse quantitative and qualitative data and information from gender equality perspective; - Ensure the reliability, accuracy and policy relevance of the data/information collected; - Draft research and communication materials; - Integrate EIGE's ad-hoc comments on activities and deliverables in a clear and timely manner; - Ensure the quality and sign all the deliverables; - Participate in meetings with EIGE or other events related to the project, if necessary.
<p>Qualifications and professional experience must include</p>	<ul style="list-style-type: none"> - University degree in social sciences, humanities or gender studies; - Minimum of five (5) years of research experience related to broad areas of gender equality, such as economy, poverty, education and training, time use, work-life balance, power and decision-making, health, violence against women. - At least three (3) publications (including articles or reports of research projects) in one of the broad areas of gender equality listed above; - Proven experience in supervising or collaborating in at least three (3) international or European research projects on gender equality, each involving at least three countries; - Excellent knowledge of English (Level C1 based on the Common European Framework of Reference for Languages).

Senior statisticians (2)

Statisticians will be responsible for collecting and analysing data, producing statistics and supporting the senior researchers and national researchers in producing the envisaged outputs.

<p>Envisaged tasks (non-exhaustive list)</p>	<ul style="list-style-type: none"> - Carry out statistical analysis of data; - Prepare statistical outputs and ensure that meaningful differences and similarities between women and men are reflected; - Assess and ensure the quality of relevant data and existing indicators for monitoring progress in gender equality; - Assess major data gaps from gender equality perspective and propose recommendations on how they could be closed; - Elaborate and analyse data (including microdata) and conduct policy relevant interpretative and comparative analysis; - Explore available survey and administrative data sources relevant for the analysis; - Integrate EIGE's ad-hoc comments on activities and deliverables in a clear and timely manner; - Ensure that data is analysed and presented following the highest quality standards of the European statistical system. - Ensure the quality and sign all the deliverables; - Participate in meetings with EIGE or other events related to the project, if necessary.
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<p>Qualifications and professional experience must include</p>	<ul style="list-style-type: none"> - University degree in statistics, mathematics or social sciences (with a significant quantitative component); - Minimum of five (5) years of experience in data analysis in social statistics, preferably linked with gender equality issues, and statistical analysis of gender disaggregated data; - Experience in work with microdata and use of statistical software; - At least three (3) publications (including articles or reports of research projects) in one of the broad areas of gender equality; - Proven experience in three (3) international or European research projects, each involving at least three countries, which included comparative statistical analysis and processing of data; - Excellent knowledge of English (Level C1 based on the Common European Framework of Reference for Languages).
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One (1) national researcher per EU Member State

A tenderer is requested to provide the capacity to set-up and co-ordinate a network of national researchers, one per Member State. National researcher will be asked to provide all the necessary information and data at country level, and to draft country analysis (country factsheet, contextual and policy analysis), upon request.

<p>Envisaged tasks (non-exhaustive list)</p>	<ul style="list-style-type: none"> - Undertake desk research and collect information on national policy measures, legal provisions and socio-economic context in relation to the domains and sub-domains of the Gender Equality Index; - Prepare statistical outputs for publication ensuring that meaningful differences and similarities between women and men are reflected; - Analyse statistical data; - Present good examples of national legal and policy measures to promote gender equality in the areas covered by the Gender Equality Index.
<p>Qualifications and professional experience must include</p>	<ul style="list-style-type: none"> - University degree in social sciences, humanities or gender studies; - Minimum of three (3) years of proven experience in research on gender equality; - At least two (2) publications (including articles or reports of research projects) on gender equality; - Excellent knowledge of English (Level C1 based on the Common European Framework of Reference for Languages).

Editor (1)

<p>Envisaged tasks (non-exhaustive list)</p>	<ul style="list-style-type: none"> - Proofread and edit all the contract deliverables.
<p>Qualifications and professional experience must include</p>	<ul style="list-style-type: none"> - Proven experience in English language proofreading and editing, editorial skills; - Proven ability to edit reports and documents in a clear and professional style; - Minimum of five (5) similar work experiences in similar projects or activities;

	- Excellent knowledge of English (Level C2 based on the Common European Framework of Reference for Languages).
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Statement of conflict of interest

Each team member shall sign a declaration of conflict of interest (see Standard Submission Forms) declaring that is not in a situation of conflict of interest and commit to inform the Contracting Authority of any change.

In case of a missing declaration and/or if a project member signs two or more declarations for two or more offers, the offer will not be accepted and will be excluded.

Lot 2 - Statistical analysis related to the Gender Equality Index

A tenderer must ensure that the project team is set-up of, as a minimum, the following profiles:

- Project manager (1) with proven experience in project management and knowledge on gender equality;
- Senior researchers (2) with proven work experience and knowledge on broad aspects of gender equality, such as economy, poverty, education and training, time use, work-life balance, power and decision-making, health, violence against women.
- Senior statisticians (2) with proven experience in social statistics, preferably gender statistics, and experience in application the advanced statistical methods;
- Editor (1) with experience in proofreading, editing, and overseeing the production of texts for publications.

Project manager (1)

The Project Manager will coordinate the project team with overall responsibility for liaising with EIGE and timely execution of the Contract.

The project manager is in charge of the coordination and administrative tasks of the project, as well as being responsible for contacting and informing EIGE about all aspects related to the execution of the contract. The project manager shall provide EIGE with frequent updates on the progress and other relevant aspects of the work. She/he must undertake responsibility for the content and quality of all the deliverables.

Envisaged tasks (non-exhaustive list)	<ul style="list-style-type: none"> - Carry-out overall responsibility for the content and quality of all deliverables; - Follow-up all administrative tasks related to the project; - Plan and manage human and financial resources; - Ensure full cooperation within the team; - Define tasks and activities, coordinate and lead their implementation against time, quality and cost criteria; - Ensure effective and responsible communication and cooperation with EIGE during the entire period of the execution of the contract; - Provide EIGE with frequent updates on the progress of implementation; - Perform risk assessment and risk mitigation during the entire period of the contract; - Participate in all meetings with EIGE and in the experts' meetings related to the project, if relevant;
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<p>Qualifications and professional experience must include</p>	<ul style="list-style-type: none"> - Sign all the deliverables. - University degree; - Minimum of five (5) years of professional experience in project management; - Proven experience in research management, as manager or coordinator of at least three (3) major international or European projects (preferably research), each involving at least three countries; - Proven experience in the area of gender equality and gender statistics; - Proven experience of analysis, assessment and evaluation of broad range of deliverables; - Excellent knowledge of English (Level C1 based on the Common European Framework of Reference for Languages).
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Senior researchers (2)

Senior researchers will be responsible for the scientific quality of all deliverables and must approve deliverables before they are submitted to EIGE.

<p>Envisaged tasks (non-exhaustive list)</p>	<ul style="list-style-type: none"> - Lead the research activities within the project in close cooperation with the Project manager and all members of the team; - Apply advance statistical methods; - Develop methodological approach for all research related activities; - Collect and analyse quantitative and qualitative data and information from gender equality perspective; - Draft research and communication materials; - Ensure the reliability, accuracy and policy relevance of the data/information collected; - Integrate EIGE's ad-hoc comments on activities and deliverables in a clear and timely manner; - Ensure the quality and sign all the deliverables; - Participate in meetings with EIGE or other events related to the project, if necessary.
<p>Qualifications and professional experience must include</p>	<ul style="list-style-type: none"> - University degree in social sciences, humanities or gender studies; - Minimum of five (5) years of research experience related to broad areas of gender equality, such as economy, poverty, education and training, time use, work-life balance, power and decision-making, health, violence against women. - At least three (3) publications (including articles or reports of research projects) in one of the broad areas of gender equality listed above; - Proven experience in supervising or collaborating in at least three (3) international or European research projects on gender equality, each involving at least three countries; - Excellent knowledge of English (Level C1 based on the Common European Framework of Reference for Languages).

Senior statisticians (2)

<p>Envisaged tasks (non-exhaustive list)</p>	<ul style="list-style-type: none"> - Develop and apply methodology for statistical analysis; - Analyse statistical data and produce gender statistics; - Prepare statistical outputs ensuring that meaningful differences and similarities between women and men are reflected; - Explore available survey and administrative data sources relevant for the analysis; - Assess the quality of relevant data and existing indicators for monitoring progress in gender equality; - Assess major data gaps from gender equality perspective and propose recommendations on how they could be closed; - Elaborate and analyse data (including microdata) and conduct policy relevant interpretative and comparative analysis; - Ensure that data is analysed and presented following the highest quality standards of the European statistical system. - Integrate EIGE's ad-hoc comments on activities and deliverables in a clear and timely manner; - Ensure the quality and sign all the deliverables; - Participate in meetings with EIGE or other events related to the project, if necessary.
<p>Qualifications and professional experience must include</p>	<ul style="list-style-type: none"> - University degree in statistics, mathematics or social sciences (with a significant quantitative component); - Minimum of five (5) years of experience in advance data analysis in social statistics, preferably linked with gender equality issues, statistical analysis of gender disaggregated data and composite indicators; - Experience in work with microdata and use of statistical software; - At least three (3) publications (including articles or reports of research projects) in one of the broad areas of gender equality; - Proven experience of work in three (3) international or European research projects, each involving at least three countries, which included analysis and processing of comparative statistical data; - Excellent knowledge of English (Level C1 based on the Common European Framework of Reference for Languages).

Editor (1)

<p>Envisaged tasks (non-exhaustive list)</p>	<ul style="list-style-type: none"> - Proofread and edit all the contract deliverables.
<p>Qualifications and professional experience must include</p>	<ul style="list-style-type: none"> - Proven experience in English language proofreading and editing, editorial skills; - Proven ability to edit reports and documents in a clear and professional style; - Minimum of five (5) similar work experiences in similar projects or activities; - Excellent knowledge of English (Level C2 based on the Common European Framework of Reference for Languages).

Statement of conflict of interest

Each team member shall sign a declaration of conflict of interest (see Standard Submission Forms) declaring that is not in a situation of conflict of interest and commit to inform the Contracting Authority of any change.

In case of a missing declaration and/or if a project member signs two or more declarations for two or more offers, the offer will not be accepted and will be excluded.

Note that team profiles could be covered by the same person (i.e. project manager and senior researcher), however it is up to the tenderer to ensure that the person meets professional requirements listed under both profiles. In addition, the timing of the activities of the profiles shall not overlap.

1.9 PERFORMANCE AND QUALITY REQUIREMENTS

The place of performance is the contractor’s premises or any premises required by the specificity of the services described in the technical requirements. The activities should be carried out in close collaboration with EIGE staff.

EIGE will monitor the project in technical and administrative terms. The contractor should report immediately in writing to the Institute any problems encountered during the implementation of the contract.

Each deliverable will be subject to a written quality assessment. A low quality of the specific deliverables in the specific request for services may lead to reduction of payment proportionally to the failure up to 30% of the total cost for the deliverable in accordance with the Article II.16 of the contract. All deliverables must comply with the requirements set out in the technical specifications, and in the Request for Services.

In particular, they will have to fulfil the following:

1. respect of deadlines
2. quality of deliverables
3. quality, consistency, coherence and relevance of the content
4. quality of language
5. the degree to which the specified requirements are implemented
6. timely incorporation of all recommendations and improvement requirements provided by EIGE, during the assessment of each deliverable.

If EIGE has to return a text to the contractor more than three times to finalise a deliverable to the appropriate standard and this happens on three occasions over six months, EIGE has the right to terminate the contract.

The contractor should work closely with EIGE through the regular exchange of information and regular consultations during EIGE’s working days and hours. The contractor should demonstrate full cooperation to EIGE’s decisions on each of the deliverables.

1.10 GENERAL TIMELINES FOR EACH YEAR

The following table present provisional time for some examples of possible expected outputs that could be requested on a yearly basis. Other outputs could be requested in any time of the year, according to the specific needs of EIGE.

DELIVERABLES	Expected outputs (examples)	Deadline (Quarter)
Lot 1 (year 1, n+1)		
D 1.1 The Gender Equality Index: EU and country data analysis	Gender Equality Index country analysis	Q2-Q3
D 1.2 Policy and contextual analysis	Policy country analysis	Q2-Q3
D 1.3 Policy brief	Policy brief	Q2
D 1.4 Communication materials	Communication products (other than country factsheets)	Q3-Q4 (and on demand)
	Country factsheets	Q2-Q3
Lot 2 (year 1, n+1)		
D 1.1 Statistical analysis related to the Gender Equality Index	Statistical analysis related to Index	Q2-Q4 (and on demand)
D 1.2 Statistical support to update the Gender Equality Index	Statistical analysis on Gender Equality Index methodology	Q2-Q4 (and on demand)
D 1.3 Communication materials	Brief notes on statistical analysis	Q2-Q4 (and on demand)

The contractor is required to regularly exchange information with EIGE in the form of telephone calls, emails, production of required outputs and meetings.

1.11 PAYMENTS

Payments under the Framework service contract shall be carried out in accordance to Article 1.6 of the Framework service contract and will be subject to prior approval of the services by EIGE within 30 days after an invoice is submitted to EIGE. An invoice must specify the tasks, the number and profiles, the working time and any other relevant and specific requirements as required by EIGE. Invoices shall clearly show a breakdown of actual costs.

1.12 INTELLECTUAL PROPERTY RIGHTS. PARTS OF THE RESULTS OF PRE-EXISTING RIGHTS

In accordance with Article II.13 of the Framework service contract, whereby EIGE acquires ownership of the results as defined in these tender specifications, these results may be used for any of the purposes listed in draft Framework service contract Article I.10.

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

1.13 RULES CONCERNING DISCLOSURE IN THE PUBLIC INTEREST

Within the limits of their legal and operational capacity external contractors, sub-contractors and their employees have the following rights:

- (a) a possibility to report serious misconduct or wrongdoing affecting EIGE to either EIGE itself or to OLAF;
- (b) making use of this possibility will not result in any retaliation, reprisal or other negative action on the part of EIGE, provided that he, she or they reasonably believe the information reported to be true.

1.14 COMPLIANCE WITH LAW OBLIGATIONS

The tender must comply with applicable environmental, social and labour law obligations established by Union law, national legislation, collective agreements or the international environmental, social and labour conventions listed in Annex X to Directive 2014/24/EU.

Tenderers must clearly show in their technical offer how they will ensure that the deliverable and related processes will comply strictly with national and EU data protection legislation, especially Regulation (EU) 2018/1725 and Directive 1995/46/EC, as well as Regulation EC No 322/97 on the processing of data for statistical purposes and Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016, which applies from 25 May 2018.

1.15 PLAGIARISM IN THE TENDER

In the tender all quotations or information originating from other sources and to which third parties may claim rights have to be clearly marked (source publication including date and place, creator, number, title, etc.) in a way allowing easy identification.

1.16 USE OF DATA

EIGE retains the right to publish any outcomes of the contract first. Reuse is authorised provided the source is acknowledged, the original meaning is not distorted and EIGE is not liable for any damage caused by that use. EIGE acquires the exclusive right to authorise or prohibit direct or indirect, temporary or permanent reuse of the results by any means (mechanical, digital, etc.) and in any form, in whole or in part. The reuse policy of EIGE is implemented by the Commission Decision of 12 December 2011 on the reuse of Commission documents (2011/833/EU). The Contractor shall inform EIGE of any possible use of the data and other outcomes of this contract.

1.17 CONFIDENTIALITY OF TENDERS

Once the Contracting authority has opened a tender, it becomes its property and shall be treated confidentially, subject to the following:

- For the purposes of evaluating the tender and, if applicable, implementing the contract, performing audits, benchmarking, etc., the Contracting authority is entitled to make available (any part of) the tender to its staff and the staff of other Union institutions, agencies and bodies, as well to other persons and entities working for the Contracting authority or cooperating with it, including contractors or subcontractors and their staff provided that they are bound by an obligation of confidentiality.
- After the signature of the award decision tenderers whose tenders were received in accordance with the submission modalities, who have access to procurement, who are not found to be in an exclusion situation referred to in Article 136(1) of the FR, who are not rejected under Article 141 of the FR, whose tenders are not found to be non-compliant with the procurement documents, and who make a request in writing will be notified of the name of the tenderer to whom the contract is

awarded, the characteristics and relative advantages of the successful tender and the price of the offer and/or contract value. The Contracting authority may decide to withhold certain information that it assesses as being confidential, in particular where its release would prejudice the legitimate commercial interests of economic operators or might distort fair competition between them. Such information may include, without being limited to, confidential aspects of tenders such as unit prices included in the financial offer, technical or trade secrets.

- The Contracting authority may disclose the submitted tender in the context of a request for public access to documents, or in other cases where the applicable law requires its disclosure. Unless there is an overriding public interest in disclosure, the Contracting authority may refuse to provide full access to the submitted tender, redacting the parts (if any) that contain confidential information, the disclosure of which would undermine the protection of commercial interests of the tenderer, including intellectual property. The Contracting authority will disregard general statements that the whole tender or substantial parts of it contain confidential information. Tenderers need to mark clearly the information they consider confidential and explain why it may not be disclosed. The Contracting authority reserves the right to make its own assessment of the confidential nature of any information contained in the tender.

2. THE TENDER

2.1 SUBMISSION OF THE TENDER

Participation in tendering procedures is open on equal terms to all natural and legal persons from one of the EU Member States and to all natural and legal persons in a third country which has a special agreement with the European Union in the field of public procurement on the conditions laid down in that agreement.

This procurement procedure is not opened to the country's parties to the plurilateral agreement on government procurement - GPA (except those mentioned in the previous paragraph).

This call for tenders is governed by the provisions of Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union (the Financial Regulation).

The Contracting authority has chosen to award the contract resulting from this call for tenders through an open procedure pursuant to Article 164(1) (a) of the Financial Regulation. In an open procedure, any interested economic operator (any natural or legal person who offers to supply products, provide services or execute works) may submit a tender.

Tenders must be submitted in accordance with the specific requirements of the Letter of Invitation to Tender and, without fail, within the deadlines laid down therein. **Further instructions how to submit a tender are added as a part of tender documents.**

To enable the Contracting authority to verify the access, each tenderer must indicate its country of establishment (and in case of joint tender – the country of establishment of each group member) and must present the supporting evidence normally acceptable under the law of that country/-ies. The same document(s) could be used to prove country/-ies of establishment and the delegation(s) of the authorisation to sign as described in Invitation to tender section 1. Where a document needs to be signed, the signature must be either hand-written or a qualified electronic signature as defined in [Regulation \(EU\) No 910/2014 on electronic identification and trust services for electronic transactions in the internal market \(the eIDAS Regulation\)](#).

For hand-written signatures see Section 1 of the Invitation to tender.

For electronic signatures see: <https://webgate.ec.europa.eu/fpfis/wikis/x/Ylrglw>.

The tender must remain valid for a period of 6 (six) months from the final date for submission of the tenders.

This invitation to tender is intended to be competitive. Any attempt by a tenderer to obtain confidential information, enter into unlawful agreements, collude or make arrangements with competitors, canvass or solicit EIGE staff or influence the evaluation committee or its individual members in any way during the tendering process will render the tender invalid.

Submission of a tender implies that the contractor accepts all the terms and conditions set out in these specifications (including the annexes and the technical specifications) and waives all other terms of business.

Submission of a tender binds the contractor to whom the contract is awarded during performance of the contract. Once EIGE has accepted the tender, it shall become the property of the Institute who shall treat it confidentially.

Entities subject to restrictive measures and rules on access to procurement: who may submit tender?

Candidates must ensure that no involved entities nor any subcontractors, including those which do not need to be identified in the request to participate are subject to [EU restrictive measures](#) adopted under Article 29 of the Treaty on the European Union (TEU) or Article 215 of the Treaty on the Functioning of the EU (TFEU)²¹, consisting of a prohibition to make available or transfer funds or economic resources or to provide financing or financial assistance to them directly or indirectly, or of an asset freeze. The prohibition applies throughout the whole performance of the contract.

EIGE shall not reimburse expenses incurred in preparing and submitting tenders. No compensation may be claimed by tenderers whose tender has not been accepted, including when the Institute (the contracting authority) decides not to award the contract.

The Protocol on the Privileges and Immunities of the European Union shall apply to this invitation to tender.

Registration in the Participant Register: why register?

Any economic operator willing to participate in this call for tenders must be registered in the [Participant Register](#) - an online register of organisations and natural persons (participants) participating in calls for tenders or proposals of the European Commission and other EU institutions/bodies.

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

Each participant needs to ensure that its SME status in the Participant Register is registered and kept up to date.

At any moment during the procurement procedure, the Research Executive Agency Validation Services (hereafter *the EU Validation Services*) may contact the participant and ask for supporting documents on legal existence and status. The requests will be made through the register's messaging system to the e-mail address of the participant's contact person indicated in the register. It is the responsibility of the participant to provide a valid e-mail address and to check it regularly. The documents that may be

²¹ Please note that the EU Official Journal contains the official list and, in case of conflict, its content prevails over that of the [EU Sanctions Map](#).

requested by the *EU Validation Services* are listed in the [EU Grants and Tenders Rules on Legal Entity Validation, LEAR appointment and Financial Capacity assessment](#).

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

2.2 CONTENT OF THE TENDER

All tenders must contain all the information and all the supporting documents required by these Specifications. In the absence of the required information or documents, EIGE may disqualify the bid. EIGE reserves the right, however, to request additional evidences in relation to the bid submitted for evaluation or verification purposes within a time limit stipulated in its request.

Tenders shall be submitted in an official EU language while the working language of EIGE is English. All tenders must include the documents referred to in Standard Submission Forms ('Checklist of documents to be completed and submitted').

2.2.1 SECTION ONE: ADMINISTRATIVE INFORMATION

The Tenderer must provide the following identification documentation:

- Tenderer Identification Form

The tenderer identification form is to be signed by a representative of the Tenderer authorised to sign contracts with the third parties.

- Legal Entity Form

The legal entity form is to be signed by a representative of the Tenderer authorised to sign contracts with the third parties. This form (individuals, private entities or public entities) is available at:

http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm

- Financial Identification Form

The original bank identification form must be filled in and signed by an authorised representative of the Tenderer and his/her bank. A standard form is available at:

http://ec.europa.eu/budget/contracts_grants/info_contracts/financial_id/financial_id_en.cfm

The above forms must be accompanied by the evidence as indicated at the bottom of each form (*for private entities*: proof of registration, VAT registration etc.; *for individuals*: copy of passport, proof of registration/VAT if applicable; *for public entities*: official document on establishment etc.).

Ways to submit a request to participate/tender: how can economic operators organise themselves to submit a request to participate/tender?

Economic operators can request to participate and subsequently submit a tender (if selected), either as a sole economic operator (sole candidate/tenderer) or as a group of economic operators (joint request to participate/tender²²). In either case subcontracting is permitted.

Tenders must be drawn and submitted in complete independence and autonomously from the other tenders. A declaration in this regard by each candidate (in case of a joint request to participate, by each of its members) shall be requested.

A natural or legal person cannot participate at the same time and for the same lot within the same procedure either as member of two or more groups of economic operators or as a sole candidate/tenderer and member of another group of economic operators. In such case, all requests to participate/tenders in which that person has participated, either as sole candidate/tenderer or as member of a group of economic operators, will be rejected.

Economic operators linked by a relationship of control or of association (e.g. belonging to the same economic/corporate group) are allowed to submit different and separate requests to participate/tenders, provided that each tenderer is able to demonstrate that its tender was drawn independently and autonomously.

A natural or legal person may act as subcontractor for several candidates/tenderers as long as the requests to participate/tenders are drawn and submitted in complete independence and autonomously from each other. However, cross subcontracting among candidates/tenderers is forbidden, more precisely an entity “A” may participate as candidate/tenderer (either as sole candidate/tenderer or as member of a group of economic operators) and as subcontractor to another candidate/tenderer “B” for the same lot within the same procurement procedure. However, in this case it is forbidden that candidate/tenderer “B” (or any of its participating members in case of a group of economic operators) is at the same time subcontractor for candidate/tenderer “A” (or for the group of economic operators in which “A” participates) for the same lot within the same procurement procedure. In this case, both requests to participate/tenders A and B shall be rejected.

An **“involved entity”** is any economic operator involved in the request to participate/tender. This includes the following four categories of economic operators:

- sole candidate/tenderer,
- group members (including group leader),
- identified subcontractors (see Section 2.4.2), and
- other entities (that are not subcontractors) on whose capacity the candidate relies to fulfil the selection criteria.

The role of each entity involved in a request to participate must be clearly specified in the eSubmission application: i) sole candidate, ii) group leader (in case of a joint request to participate), iii) group member (in case of a joint request to participate), or iv) subcontractor²³.

For an entity on whose capacities the candidate relies to fulfil the selection criteria (that is not a subcontractor), this role is defined in the commitment letter.

²² Each economic operator participating in the joint request to participate/tender is referred to as “group member”.

²³ Only identified subcontractors (see Section 2.4.2) must be specified in the eSubmission application.

Joint Offers

A joint tender is a situation where an offer is submitted by a group of tenderers (consortium). If awarded the contract, each member of the consortium will be jointly and severally liable towards EIGE for the performance of the contract.

A consortium can be a permanent, legally established grouping or a grouping which has been constituted for this tender procedure.

Consortia members in joint tenders may submit only one tender for a single contract. All members of the consortium shall sign the tender or one of the consortium members which is designated as the representative authorised to undertake commitments on its behalf (copy of the authorisation must be provided with the offer).

The tender must indicate which member (lead consortium partner) will represent the consortium in dealing with the contracting authority. The tender must describe the form the cooperation is to take in order to achieve the desired results and how technical, administrative and financial aspects will be organised.

If the tender does not mention that all members are jointly and severally liable, all other parties included in the tender than the party signing the tender (tenderers) will be considered subcontractors.

In case of submission of a joint offer, the tenderers are asked to provide duly signed one of the attached Powers of attorney of the Standard Submission Forms depending on the set up that has been chosen by the Tenderers, and specify the role of the group, as well as who has been appointed by the others as the group leader.

After the award, the Contracting Authority will sign the contract either with all members of the group, or with the leader on behalf of all members of the group, authorised by the other members via powers of attorney.

Subcontracting

Subcontracting is the situation where the Contractor in order to implement the contract, enters into legal commitments with other legal or natural persons for performing part of the service (in particular, any work performed by a person who is not an employee of the tenderer will be considered as subcontracted).

The Contractor shall remain bound by his/her obligations to EIGE and shall bear exclusive liability, sole and fully responsibility for the performance of the contract. EIGE has no direct legal relationship with the subcontractor(s).

Tenderers are required to identify all subcontractors whose share of the contract is above 10%.

In such case, the tender must include, using models in Standard Submission Forms:

- a subcontracting form by tenderer clearly stating the roles, activities and responsibilities of the proposed subcontractor(s), and the reasons why subcontracting is envisaged;
- a letter of intent by each proposed subcontractor stating its intention to collaborate with the tender if the tenderer wins the contract and their willingness to accept the tasks and the terms and conditions of the contract.
- signed Declaration on honour on exclusion criteria and selection criteria by subcontractors whose share of the contract is above 10%. (ref. Section 2.2.3.1).

The tenderer must indicate clearly in their methodology, which parts of the work will be sub-contracted.

The main contractor retains full liability towards EIGE for performance of the contract as a whole and of each its part. Accordingly:

- EIGE will treat all contractual matters (e.g. payment) exclusively with the main Contractor, whether or not the tasks are performed by a subcontractor;
- under no circumstances can the main Contractor avoid liability towards the agency on the grounds that the subcontractor is at fault.

Prior written approval from EIGE is necessary in order to replace a subcontractor and/or have work which was not originally subcontracted in the original tender carried out by third parties.

In case the identity of subcontractors is not known at the time of submitting the offer, any future subcontract may be awarded according to the provisions of the contract.

2.2.2 SECTION TWO: EXCLUSION CRITERIA DOCUMENTATION

All tenderers must provide a declaration on honour (see Standard Submission Forms), signed and dated by an authorised representative, stating that they are not in one of the situations of exclusion listed in that declaration on honour.

In case of joint tender, each member of the group must provide a declaration on honour signed by an authorised representative.

In case of subcontracting, subcontractors whose share of the contract is above 10% and whose capacity is necessary to fulfil the exclusion criteria must provide a declaration on honour signed by an authorised representative.

The Contracting Authority reserves the right to verify whether any tender candidate is in one of the situations of exclusion by requiring the supporting documents listed in the declaration of honour.

Upon request, the tender candidate must provide the documents mentioned as supporting evidence in the declaration on honour upon submission of a tender and within a deadline given by the contracting authority. This requirement applies to each member of the group in case of joint tender and to subcontractors whose share of the contract is above 10% and whose capacity is necessary to fulfil the exclusion criteria.

The obligation to submit supporting evidence does not apply to international organisations.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit the documentary evidence if he/she submitted them for another procurement procedure and provided the documents were issued not more than one year before the date of their request by the contracting authority and are still valid at that date. In such cases, the tenderer must declare on his/her honour that the documentary evidence has already been provided in a previous procurement procedure, indicate the reference of the procedure and confirm that there has been no change in its situation.

The tender candidate shall provide, within 10 calendar days following the dispatch of the documentary evidence request email, the following evidences confirming the statements referred to in the Declaration on honour on exclusion criteria and selection criteria (see Standard Submission Form).

No contract will be awarded to tenderers who, at the time when contracts are being awarded under this procedure:

a) have a conflict of interest. EIGE must ensure that the tenderer does not, at the time of submitting a tender, have any conflict of interest in connection with this call for tenders. A conflict of interest possibly arises in particular as a result of economic interests, political or national affinities, family or emotional ties, or any other relevant connection or shared interest. EIGE reserves the right to assess whether a conflict of interest exists.

b) have been guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or have failed to supply that information

Tenderers are asked to declare (see Standard Submission Forms “Declaration on honour on exclusion criteria and selection criteria”):

- that they have not made and will not make any offer of any type whatsoever from which an advantage can be derived under the contract;
- that they have not granted and will not grant, have not sought and will not seek, have not attempted and will not attempt to obtain, and have not accepted and will not accept, any advantage, financial or in kind, to or from any party whatsoever, constituting an illegal practice or involving corruption, either directly or indirectly, as an incentive or reward relating to the award of the contract;
- that they will inform the contracting authority, without delay, of any situation constituting a conflict of interest or which could give rise to a conflict of interest.

The initial verification of non-exclusion of tenderers will be done on the basis of the submitted declarations and consultation of the European Union's Early Detection and Exclusion System.

Tenderers are asked to provide supporting documents as listed in Art. 137(3) FR. They consist mainly in an extract of judicial record, a certificate on payment of social security and a certificate on payment of taxes. The extract from the judicial record and administrative certificates can be regarded as recent if they are not more than one year old starting from their issuing date and are still valid at the date of their request by the contracting authority.

If a certificate is not issued in the country concerned, it may be replaced by a sworn statement (made before a person authorised by law). Failing that, it may be replaced by a solemn statement made by the interested party before a judicial or administrative authority, a notary or a qualified professional body (chamber of commerce, etc.). Normally, solemn statements are not made before an authority; this is a requirement added by the FR.

EIGE will waive the obligation for a candidate or tenderer to submit the documentary evidence if it has already been submitted for another procurement procedure of EIGE and provided the documents were issued not more than one year earlier and are still valid at the date of their request by the contracting authority. In such cases, the candidate or tenderer must declare on its honour that the documentary evidence has already been provided in a previous procurement procedure, provide reference to that procedure and confirm that there has been no change in the situation. EIGE will also waive the obligation for a candidate or tenderer to submit the documentary evidence if it can access it on a national database free of charge or in the case of material impossibility to provide such evidence.

Tenderers found to be in an exclusion situation will be rejected.

2.2.3 SECTION THREE: SELECTION CRITERIA DOCUMENTATION

This part of the tender concerns the evidences relating to the economic and financial capacities, and legal, regulatory capacities as well as technical and professional, capacities of the service provider(s) involved in the bid.

The proper implementation of the contract requires a multiplicity of skills, capacities and different types of expertise to be combined in the performance of the various tasks and activities.

An economic operator may rely on the capacities of other entities, regardless of the legal nature of the links which it has with them. It must in this case prove to EIGE that it will have at its disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place those resources at its disposal. EIGE may require that the economic operator and the entities referred to in this paragraph are jointly liable for the execution of the contract.

In the case of joint tender (consortium) or subcontracting, the technical and professional capacity

shall be assessed in relation to the combined capacity of all the parties involved in the tender.

EIGE reserves the right to request additional information for the evaluation of the economic and financial capacity of each member of a consortium.

In case a subcontractor receives less than 30% of the contract and the main Contractor does not rely on the subcontractor’s economic and financial capacity, that subcontractor does not have to provide the economic and financial capacity form.

Before the award decision, the contracting authority may request documentary evidence on compliance with the selection criteria set out in the present tender specifications. All tenderers are invited to prepare in advance the documents related to the evidence, since they may be requested to provide such evidence in a short deadline. In any event, the tenderer proposed by the evaluation committee for the award of the contract, will be requested to provide such evidence.

Failure to provide valid documentary evidence within the deadline set by the Contracting Authority shall lead to the rejection of the tender for the award of the contract, unless the tenderer can justify the failure on the grounds of material impossibility.

Please note that a request for evidence in no way implies that the tenderer has been successful.

2.2.3.1 Economic and financial capacity. Legal and regulatory capacity

Economic and financial capacity

Tenderers must provide EIGE with sufficient proof of their financial standing, and more importantly that they have the necessary resources and financial means to carry out the work involved. The tenderer must prove they are viable for the duration of the contract.

The tenderer must have the necessary economic and financial capacity to perform this contract until its end. In order to prove their capacity, the tenderer must comply with the following selection criterion:

- For Lot 1, the average annual turnover of the tenderer must be minimum EUR 480,000 during the past 3 years.
- For Lot 2, the average annual turnover of the tenderer must be minimum EUR 200,000 during the past 3 years.

Evidence on compliance with the economic and financial capacity requirement must be provided by the following documents:

- The tenderers (including each member of the group in case of joint tender) and subcontractors whose capacity is necessary to fulfil the selection criteria must provide the Declaration on Honour (see Standard Submission Forms), signed and dated by an authorised representative, stating that they fulfil the selection criteria applicable to them. In case of joint tender or subcontracting, the criteria applicable to the tenderer as a whole will be verified by combining the various declarations for a consolidated assessment.

This declaration is part of the declaration used for exclusion criteria so only one declaration covering both aspects should be provided by each concerned entity.

- The tenderer which according to the law of the country in which it is established is required to publish the profit and loss accounts and balance sheet shall complete and include in the

offer a statement "Economic and financial capacity" as presented in the Standard Submission Forms. It should be presented in original and certified by means of a signature of the chief accounting officer of the tendering organisation. The tenderer which according to the law of the country in which it is established is not required to publish the balance sheet shall provide the extract from the budget.

In the case of a consortium submitting an offer, the consortium may rely on the capacities of members of the consortium. It must prove in its offer that it will have their resources at its disposal.

The statements of Economic and financial capacity should be included in the offer for all consortium partners.

In the case of a physical person the financial statement should be included into the offer for where only two lines on Turnover need to be filled in and the financial statement can be signed by the physical person only.

Legal and regulatory capacity

Tenderers must demonstrate that they are enrolled in a relevant trade or professional register or, to hold a particular authorisation proving that it is authorised to perform the contract in its country of establishment in relation to the subject of the contract.

- A tenderer is asked to confirm that they are authorised to perform the contract under the national law as evidenced by inclusion in a trade or professional register, or a sworn declaration or certificate, membership of a specific organisation, express authorisation or entry in the VAT register.

Evidence on compliance with the legal and regulatory capacity requirement must be provided by the following documents:

- Duly filled in and signed Legal Entity Form (see Standard Submission Forms) accompanied by the documents requested therein.
- The tenderers (including each member of the group in case of joint tender) and subcontractors whose share of the contract is above 10% must provide the Declaration on honour on exclusion criteria and selection criteria.

The legal and regulatory capacity shall be proven by the evidence listed below:

- Proof of enrolment in a relevant trade or professional register
- Proof of authorisation that the candidate is authorised to perform the contract in its country of establishment
- Proof that the candidate is a member of a specific professional organisation.

Please note that each tenderer (and each member in case of a joint offer) shall declare in the relevant field in the Identification of the Tenderer Form, whether it is a Small or Medium Size Enterprise (SME) in accordance with Commission Recommendation 2003/361/EC²⁴.

²⁴ Commission Recommendation of 6 May 2003 concerning the definition of micro, small and medium-sized enterprises, available at <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2003:124:0036:0041:en:PDF>

In addition, involved entities (see Section 2.4) and all subcontractors, including those which do not need to be identified in the request to participate (see Section 2.4.2), must not be subject to [EU restrictive measures](#) adopted under Article 29 of the Treaty on the European Union (TEU) or Article 215 of the Treaty on the Functioning of the EU (TFEU)²⁵ that constitute a legal impediment to perform the contract. This requirement will be assessed by reference to the EU restrictive measures in force. Therefore, the candidate is not required to submit any evidence of not being subject to EU restrictive measures.

2.2.3.2 Technical and professional capacity required and their documentary presentation

The technical and professional capacity of the tenderers to provide the services required will be assessed with regard to their know-how, efficiency, effectiveness, experience, reliability in providing the required expertise.

The tenderer needs to demonstrate in the Offer the capacity to knowledge, experience and capacity, applicable to Lot 1 and Lot 2:

- good knowledge of strategies, policies and legislation on gender equality and gender-related issues at EU and Member State level;
- good understanding of the different socio-economic realities, stages of development, and culture and traditions as regards gender equality in the EU Member States and their regions;
- experience in accessing and working with EU wide databases and microdata on gender equality related topics;
- experience in assessing and analysing EU wide databases, presenting and interpreting gender disaggregated data from gender equality and intersecting inequalities perspectives;
- capacity to manage the project and deliver timely high-quality final deliverables;
- capacity to build and effectively manage the team of experts (competences of the team indicated in these technical specifications);
- ability to research, analyse and process large amounts of data and information in a systematic, rigorous and accessible manner;
- strong analytical and writing skills, experience in drafting analytical reports in a European context;
- capacity to assure high quality of writing, editing, and overseeing the production of texts for publications;
- very good command of English.

For Lot 1, the tenderers need to demonstrate, in addition:

- capacity to build and effectively manage the network of national researchers (indicated in these technical specifications);
- ability to complement information from national researchers with information from other sources;
- capacity to validate the linguistic quality of outputs.

For Lot 2, the tenderers need to demonstrate, in addition:

- knowledge and experience in advanced statistical analysis and statistical methodologies;
- knowledge and experience in building composite indicators;

²⁵ Please note that the EU Official Journal contains the official list and, in case of conflict, its content prevails over that of the [EU Sanctions Map](#).

- knowledge in the methodology of the Gender Equality Index.

In the case of joint offer (consortium) or subcontracting, the technical and professional capacity shall be assessed in relation to the combined capacity of all the parties involved in the tender.

Evidence of the technical and professional capacity shall be presented as indicated in Standard Submission Forms by the following:

For Lot 1 - Gender Equality Index - data and policy analysis for the EU and Member States

Criterion T1: The tenderer must prove experience in research and statistical analysis in the field of gender equality as well as drafting reports and recommendations.

Evidence for T1:

At least three (3) EU and/or international projects, involving at least three (3) countries, within the past five (5) years, which carried out research and statistical analysis in the field of gender equality, specifying the Tenderer’s share in the project (minimum 50% of the project).

Criterion T2: The tenderer must prove experience in leading EU and/or international projects.

Evidence for T2:

The tenderer must provide references of at least two (2) EU and/or international projects, involving at least three (3) countries within the past five (5) years in which the tenderer acted in a leading capacity; it may be the same projects as for evidence for T1, however the clear distinction shall be made. The combination of projects must cover the required geographical scope.

Criterion T3:

The tenderer must demonstrate the capacity to build, coordinate and manage the team of experts (experiences, skills and competences of the team indicated in these technical specifications). The team shall be competent to ensure quality of all the expected results and deliverables.

Evidence for T3:

The Curricula Vitae (CVs), preferably in a common European format, of the proposed members of the team must be enclosed and must clearly show evidence of the experience and skills required. The form can be downloaded from:

<https://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>

The successful tenderer may be requested to provide the diplomas and professional qualifications of the persons responsible for providing the services, including any publications and/or studies and/or any other type of relevant work in the field that is the object of this contract.

Criterion T4:

The tenderer must demonstrate the capacity to build, coordinate and manage a network of National researchers, one per EU Member State (experiences, skills and competences of the research team indicated in these technical specifications). National researchers shall be competent to ensure quality of the expected results and deliverables.

Evidence for T4:

At least two (2) EU and/or international projects, involving a number of National researchers and/or experts, of at least five (5) different countries, within the past five (5) years in which the tenderer acted in a leading capacity; it may be the same projects as for evidence for T1 or T2, however the clear distinction shall be made.

The Curricula Vitae (CVs), preferably in a common European format, of the proposed National researchers must be enclosed and must clearly show evidence of the experience and skills required.

The form can be downloaded from:

<https://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>

The successful tenderer may be requested to provide the diplomas and professional qualifications of the persons responsible for providing the services, including any publications and/or studies and/or any other type of relevant work in the field that is the object of this contract.

For Lot 2 – Statistical analysis related to the Gender Equality Index

Criterion T1: The tenderer must prove experience in advanced statistical analysis and statistical methodology as well as drafting reports and recommendations.

Evidence for T1:

At least three (3) EU and/or international projects , involving at least three (3) countries, within the past five (5) years, which applied advanced statistical methods of analysis to EU wide data, specifying the Tenderer’s share in the project (minimum 50% of the project).

Criterion T2: The tenderer must prove experience in leading EU and/or international projects.

Evidence for T2:

At least two (2) EU and/or international projects, involving at least three (3) countries, within the past five (5) years in which the tenderer acted in a leading capacity; it may be the same projects as for evidence for T1, however the clear distinction shall be made.

Criterion T3: The tenderer must demonstrate the capacity to build, coordinate and manage the team of experts (experiences, skills and competences of the research team indicated in these technical specifications). The team shall be competent to ensure quality of the expected results and deliverables.

Evidence for T3:

The Curricula Vitae (CVs), preferably in a common European format, of the proposed members of the team must be enclosed and must clearly show evidence of the experience and skills required.

The form can be downloaded from:

<https://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>

The successful tenderer may be requested to provide the diplomas and professional qualifications of the persons responsible for providing the services, including any publications and/or studies and/or any other type of relevant work in the field that is the object of this contract.

2.2.4 SECTION FOUR: TECHNICAL OFFER

This section is of a great importance in the assessment of the bids, the award of the contract and the future execution of any resulting contract. Attention is also drawn to the award criteria, which define those parts of the technical offer to which the tenderers should pay particular attention. The technical offer should address the tenderer’s approach to and solutions for all matters laid down in the technical specifications while the tenderer should be aware, that a simple repetition of the Technical specification will result in a very low technical score. The level of detail of the tender will be very important for the evaluation of the tender.

To grant equal treatment of all tenders, it is not possible to modify offers after their submission. As a consequence, incompleteness in this section can only result in negative impact for the evaluation of award criteria. Please note also, that offers deviating from the Technical Specifications may be rejected for non-conformity.

The Technical Specifications and the tenderer's bid shall be integral parts of the contract and will constitute annexes to the contract, while in case of contradictions the Technical Specifications prevail.

The Tender must demonstrate a clear understanding of the objectives and assignments, methodological approach including quality assurance and quality control, project management, organisation of the project team and communication, work plan and timelines.

The tenderer must submit its Technical Offer following the structure described below, applicable for both Lots, if not specified differently:

- 1) Proposed methodology. Tenderers should present a detailed methodological approach to country analysis of the Gender Equality Index-related data and policy developments, and explain the reasons for their specific methodological choice and its suitability for an effective implementation of the activities and the production of deliverables as defined by the Technical Specifications. The choice must be grounded in established social science research methodologies. The tenderer should demonstrate experience of having used the chosen methodology in performing similar analysis. Efficiency, quality and usefulness of the methodology in regard to the proposed deliverables will be assessed. Appropriateness of application of the methods for processing, assessing and interpretation of the existing data and information will be considered. Tenderers are to clearly indicate how the methodological difficulties in the process, if any, will be tackled.
- 2) The operational structures provided to implement the activities and to fulfil the foreseen tasks, with particular emphasis on project management, coordination of tasks within the team, with National researchers and with sub-contractors (if applicable), coordination of expertise required and the strategy to manage different activities in the given timeline.

The project management, organisation of the project team, internal communication structure shall be presented and shall include at least:

 - 1.1. Detailed presentation of the project management plan and roles each individual will perform for effective and timely implementation of the project
 - 1.2. Detailed presentation of the project management regarding the involvement of the National researchers (**only for Lot 1**)
 - 1.3. Detailed presentation of how the internal communication within the team and interaction with EIGE will be organised
- 3) Quality assurance. Tenders shall present how the quality of deliverables will be assured, how the experts will be engaged in the development of the methodology and how the highest language standard of the deliverables will be assured. The quality assurance shall at least include the description on the following:
 - 1.4. Quality of deliverables
 - 1.5. Quality of language
- 4) Detailed presentation of risk management strategy
- 5) Simulation of a technical proposal referred to the following scenario (**see below, one for Lot 1 and one for Lot 2**) regarding a possible request for services to the contractor. Budget needs to

be allocated accordingly.

The scenarios presented serve dual purposes: firstly, to assist potential tenderers in understanding the type of deliverables that they can be expected to produce under the framework contract; secondly, to enable EIGE to evaluate the quality of tenders, including price proposals.

It should be emphasised that EIGE reserves the right not to launch any requests under the framework contract and that the tasks listed in the scenarios will not necessarily feature in any requests for services under the framework contract. The scenarios are presented for tender evaluation purposes only and do not necessarily describe potential agreements under the framework contract. Tenderers should, for the scenarios below (one respectively for Lot 1 and Lot 2), present their methodology, i.e. their understanding of the tasks and how they propose to carry out the tasks. The proposal will include a conceptual basis and preliminary outline of the outputs to be achieved under each scenario. Tenderers should indicate the main sources and specify the resources required, their proposed time schedule and the price.

The scenario shall include, at least:

- The approach taken for the successful completion of the request for service;
- The project work plan;
- Allocation of days per profile.

SCENARIO FOR LOT 1 – Gender equality and intersecting inequalities in the EU

The Gender Equality Index is a comprehensive measure developed by EIGE for assessing the state of art and monitoring progress in gender equality across the EU over time. It relies on a conceptual framework that embraces different theoretical approaches to gender equality and integrates key gender equality issues within the EU policy framework. It measures gender equality through a selection of 31 indicators divided into six core domains (work, money, knowledge, time, power, health).²⁶ The Gender Equality Index further extended its scope by giving particular attention to the domains of violence against women and of intersecting inequalities.

In particular, the Gender Equality Index unmasks some of the explicit differences within groups of women and men by accounting for some of the relevant social factors: age, (dis)ability, migrant background (measured by the country of birth), education and family composition²⁷. On the one hand, the concept of diversity contends that focusing solely on the binary categories of gender is not sufficient, while on the other hand the number of intersecting categories is theoretically as great as the number of individuals concerned. The problem is compounded by pragmatic issues such as determining the areas of gender equality that can be examined under the principle of intersecting inequalities. Being a cross-cutting issue, different gender gaps exist between different groups in all of the domains considered in the Index.

Since 2010, all Presidencies of the Council of the EU have requested EIGE contributions, increasing the research scope to support decision-making at EU level. As of 2022, the thematic focus of the Gender Equality Index and related policy briefs support the Presidency of the second semester, while reports focusing on BPfA implementation support Presidencies of the first semester. In 2022, EIGE produced a policy brief on *Young women and men in the aftermath of the COVID-19 pandemic*²⁸ for the

²⁶ For more details, see the latest Index methodological report at <https://eige.europa.eu/publications/gender-equality-index-2017-methodological-report>.

²⁷ For more details, see the latest methodological report at [Intersecting inequalities: Gender Equality Index | European Institute for Gender Equality \(europa.eu\)](https://eige.europa.eu/publications/intersecting-inequalities-gender-equality-index)

²⁸ [Young women and men in the aftermath of the COVID-19 pandemic | European Institute for Gender Equality \(europa.eu\)](https://eige.europa.eu/publications/young-women-and-men-in-the-aftermath-of-the-covid-19-pandemic)

Czech presidency of the European Union, and in 2023 will release a policy brief on *Bridging the gender care gap to achieve work-life balance for all* for the Spanish presidency (forthcoming).

In this framework, EIGE would like to develop a policy brief on *Gender equality in the EU with an intersectional perspective*, to support the forthcoming EU presidencies.

The policy brief will be used to inform policy makers in the EU on the main inequalities between women/girls and men/boys, starting from the ones currently considered by the Gender Equality Index. Additionally, the policy brief should inform policy makers on other potential layers of intersectionality (sexual orientation, same-sex couple within household types, urban/rural dimension, among others), on the basis of the most recent available data.

The policy brief should be based on indicators and intersecting inequality data of the gender Equality Index, and on additional data retrieved among the EU sources of data and mostly connected with the respective Index indicators.

The purpose of this request for services is to support the analysis and interpretation of the indicators and intersecting inequality data used for the Gender Equality Index, and to possibly expand the analysis to other layers.

The contractor should propose to enrich the analysis with other relevant intersecting inequality layers applied to the respective Index indicators (sexual orientation, same-sex couple within household types, urban/rural dimension, among others), and to other relevant indicators not yet included in the Gender Equality Index. The proposals should be justified on the basis of their conceptual and policy relevance. The contractor should present a methodology to collect data and run the needed computations on proposed indicators and intersecting inequalities on the basis of the main EU wide sources (Eurostat, Eurofound, FRA, among others), including the analysis of microdata.

The specific objectives of this request for services are to:

- provide state of play and trend analysis of the Gender Equality Index indicators and intersecting inequalities for the EU and Member States;
- provide technical proposals to further extend the intersecting inequalities analysis of the Index indicators to sexual orientation, same-sex couple and urban/rural dimension;
- provide a methodology to analyse and present intersecting inequalities, exploring different analytical methods.

Specific tasks

The contractor will carry out a detailed state of play and trend analysis of the Gender Equality Index 2022 indicators and intersecting inequality data at the EU and Member State level.

The contractor will also produce additional analysis based on the main EU surveys (EU-LFS, EU-SILC, FRA LGBTQI survey) of the most recent year, and will provide a methodology to elaborate the intersecting inequalities data for the Index indicators for the requested layers (sexual orientation, same-sex couple and urban/rural dimension).

On the basis of this analysis, the contractor will produce a policy brief on *Gender equality in the EU with an intersectional perspective*.

The Contractor must ensure that the following tasks will be implemented:

1. To participate in the **Inception meeting** during the first 2 weeks after the signature of the contract. The project manager and the senior staff from the Contractor’s team shall attend

the meeting. During the Inception meeting, the contractor will explain how the specific objectives and tasks under this request for services will be implemented, including a timetable of final deliverables;

2. To draft the **Inception report (Deliverable 1)**, which shall include:
 - Any update to the methodology, organisation and timing of the work to deliver the requested services;
 - Brief minutes from the inception meeting.
3. To produce a **methodological note on additional intersecting inequalities analysis on sexual orientation, same-sex couple and urban/rural** areas based on the most recent EU wide surveys, as applicable to the Index indicators (**Deliverable 2**).

The contractor should analyse at least the main EU surveys (EU-LFS, EU-SILC, FRA LGBTQI), and propose a methodology to elaborate the intersecting inequality data and to analyse it for the Index indicators for the requested layers (sexual orientation, same-sex couple and urban/rural dimension).

When data is available on the providers’ websites (Eurostat database, FRA explorer, for instance), the contractor should propose the relevant available disaggregation for the analysis. When data is not available, the contractor should analyse the source of data (questionnaires and metadata), and propose possible elaboration to calculate the intersecting inequalities for the Index indicators based on microdata.

The contractor will be asked to obtain the microdata at Member State and EU level of the EU-LFS, EU-SILC and FRA LGBTQI of the most recent year, to analyse and to elaborate it for the purpose of the analysis, and to produce detailed documentation of the analysis undertaken, such as SPSS syntax/Stata do-files/R-scripts used to generate results.

The contractor should also analyse the limitations of available data and microdata in responding to the requested analysis of additional intersecting inequalities.

The contractor is expected:

- to review the providers’ websites and the survey questionnaire and microdata and propose a methodology to collect, elaborate and disaggregate data and microdata to extend the intersecting inequalities analysis to the 31 indicators of the gender equality index to sexual orientation, same-sex couples and urban/rural dimension from the EU-LFS, EU-SILC and FRA LGBTQI surveys;
 - to obtain/collect and analyse microdata at Member State and EU level from the EU-LFS, EU-SILC and FRA LGBTQI surveys;
 - to provide technical proposals to further extend the intersecting inequalities analysis of the Index indicators to sexual orientation, same-sex couple and urban/rural dimension;
 - to provide an assessment of limitations of the data and microdata for the analysis of the additional intersecting inequalities;
 - to apply different analytical methods to study intersectionalities;
 - to provide different visualisations to capture the different realities of the different population groups studied;
 - to produce detailed documentation of the analysis undertaken, such as Excel files in which analysis was performed or SPSS syntax/Stata do-files/R-scripts used to generate results.
4. To produce a policy brief on *Gender equality in the EU with an intersectional perspective (Deliverable 3)*.

The policy brief should be based data of the Index indicators and intersecting inequalities provided by EIGE and on microdata analysis of the EU-LFS, EU-SILC and FRA LGBTQI survey (deliverable 2).

The policy brief should include a brief policy context, research findings mainly based on the results of Index 2022, but also the main research findings from EIGE’s other Index releases and studies, and focused on main recommendations related to gender inequalities and intersecting inequalities.

EIGE will provide data of Index indicators and intersecting inequalities, also available on the EIGE’s website²⁹.

Once the outline of brief is approved by EIGE, the contractor is expected:

- To develop a methodological proposal (scope, concept, political relevance, data sources, methods of analysis) of the policy brief(s);
- To identify and collect information on EU and/or national topics, policies and legal developments relevant for the interpretation of results;
- To carry out the analysis of data, including microdata at Member State and EU level;
- To draft policy brief(s) describing analysis carried out (including charts, tables and other visualisations), its main results, and information collected;
- To produce detailed documentation of the analysis undertaken, such as Excel files in which analysis was performed or SPSS syntax/Stata do-files/R-scripts used to generate results.

The contractor is expected to deliver a first draft of the policy brief by 6 weeks after the signature of the contract. The first draft should be in line with the outline agreed with EIGE, and it should include preliminary proposed data analysis and points of interests, in bullet points. The final version of the policy brief is expected by 16 weeks after the signature of the contract.

The structure of the policy brief should be in line with the standard template for the EIGE’s policy briefs. In particular, the policy brief should contain an executive summary, a synthesis of the evidence and the rationale for action (no more than 4 or 5 most striking points of evidence or points of interest), and policy recommendations. EIGE will provide the policy brief template, and the contractor should consider other similar outputs produced by EIGE as an example, for instance the policy brief *Young women and men in the aftermath of the COVID-19 pandemic*³⁰.

The technical proposal for the Request for Services (RS)

The technical proposal should include, at least:

- The description of methodology of the interpretative analysis of the intersecting inequalities data of the Gender Equality Index;
- The description of the methods of collection, computation and analysis of the additional intersecting inequalities analysis on sexual orientation, same-sex couple and urban/rural;
- To description of the methodological proposal (scope, concept, political relevance, data sources, methods of analysis) of the policy brief;
- The structure of the presentation of research results;
- The proposal for the presentation of data and information (graphs/tables/infographics, etc.);
- The proposal for the format of the technical deliverables complementing the analysis (such as Excel files in which analysis was performed or SPSS syntax/Stata do-files used to generate results);
- The management of the research work, including work plan, organisation of human resources, expected deadlines and allocated days per profile.

²⁹ [European Union | Family type | Work | Intersecting inequalities | 2022 | Gender Equality Index | European Institute for Gender Equality \(europa.eu\)](#)

³⁰ [Young women and men in the aftermath of the COVID-19 pandemic | European Institute for Gender Equality \(europa.eu\)](#)

Additional information

The contractor will work in close collaboration with EIGE’s staff, who will provide the data for indicators and intersecting inequalities of the Gender Equality Index.

The deliverables shall be presented in English, reader-friendly and written in an attractive way, using a form and language that is easy to understand and aimed at a wide audience.

Deadlines and size of the deliverables

Deliverables	Size of the deliverable	Timeline
D.1 Inception report	5-10 pages	Week 3
D.2 Methodological report on extended intersecting inequalities	10-15 pages (plus annexes)	Week 16-20
D.3 Policy brief on <i>Gender equality in the EU with an intersectional perspective</i>	8-12 pages	Week 20-30

Duration: 7 months.

Type of contract: quoted time and means.

The maximum amount covering the service is: 60,000 EUR.

SCENARIO FOR LOT 2 – Gender Equality Index forecast

The Gender Equality Index is an assessment tool for analysing gender equality gaps over time and geographically. It raises awareness of the situation of women and men in Member States, both in general and in selected domains (work, money, knowledge, time, power, health) of gender equality. The Gender Equality Index helps to identify strong and weak aspects of the national situation and facilitates inter-country comparisons.

The purpose of this request for service is to provide a methodology on forecasting the Gender Equality Index scores, both at EU level and by Member State. The analysis should be based on advanced analytical and statistical methodologies and tools.

The contractor is expected to propose an analytical approach on how the Gender Equality Index could be predicted, aiming to provide to EIGE’s stakeholders concrete guidelines on how to improve their scores and by what amount by acting through a set of key explanatory variables. These variables could be components of the Index and relevant external variables not included in the Index.

The proposed methodology should respond to the following questions:

- Which are the relevant sources to be checked, both statistical and policy sources?
- How to identify the initial list of explanatory variables to be tested? Which are the selecting criteria to guarantee their relevance?
- How to guarantee that both the EU level and the country level are well covered in the analysis?
- What statistical analysis would be necessary to assess the suitability of the initial list of explanatory variables?
- How to select the final list of variables to work with?
- What statistical methods would be advisable to forecast the Gender Equality Index scores in the next five years, both at EU level and by Member State? Which are the pros and cons of the proposal presented?
- How to assess the goodness of the model proposed?
- How country groupings based on the results obtained could be established?
- How intersectional perspective could be integrated in the analysis?
- Which are the most appropriate visualisation tools to present the results to EIGE’s stakeholders?

Specific tasks

The Contractor must ensure that the following tasks will be implemented:

1. To participate in the **Inception meeting** during the first 2 weeks after the signature of the contract. The project manager and the senior staff from the Contractor’s team shall attend the meeting. During the Inception meeting, the contractor will explain how the specific objectives and tasks under this request for services will be implemented, including a timetable of final deliverables;
2. To draft the **Inception report (Deliverable 1)**, which shall include:
 - Any update to the methodology, organisation and timing of the work to deliver the requested services;
 - Brief minutes from the inception meeting.

3. To provide a **report on the Gender Equality Index forecast (Deliverable 2)** with the description of the methodology applied and the results obtained.

The contractor is expected to propose an analytical approach on how the Gender Equality Index could be predicted, aiming to provide to EIGE’s stakeholders concrete guidelines on how to improve their scores and by what amount by acting through a set of key explanatory variables. These variables could be components of the Index and relevant external variables not included in the Index. The proposal should include, at least:

- Statistical methodology on forecasting the Gender Equality Index scores, both at EU level and by Member State, answering the research questions above;
- The description of the technical deliverables complementing the analysis (such as Excel files in which analysis was performed or SPSS syntax/Stata do-files/R-scripts used to generate results);
- The structure of the presentation of research results.

The contractor is expected to deliver a first draft of the report by 12 weeks after the signature of the contract. The first draft should be in line with the outline agreed with EIGE, and it should include preliminary proposed methodology and points of interests, in bullet points. The final version of the policy brief is expected by 26 weeks after the signature of the contract.

The technical proposal for the Request for Services (RS)

The technical proposal should include, at least:

- The description of methodology on forecasting the Gender Equality Index scores, both at EU level and by Member State
- The proposal for the format of the technical deliverables complementing the analysis (such as Excel files in which analysis was performed or SPSS syntax/Stata do-files used to generate results);
- The proposal for the presentation of data and information (graphs/tables/infographics, etc.);
- The structure of the presentation of research results;
- The management of the research work, including work plan, organisation of human resources, expected deadlines and allocated days per profile.

Additional information

The contractor will work in close collaboration with EIGE’s staff, who will provide the data for indicators and intersecting inequalities of the Gender Equality Index.

The deliverables shall be presented in English, reader-friendly and written in an attractive way, using a form and language that is easy to understand and aimed at a wide audience.

Deadlines and size of the deliverables

Deliverables	Size of the deliverable	Timeline
D.1 Inception report	5-10 pages	Week 3
D.2 report on the Gender Equality Index forecast	10-15 pages (plus annexes)	Week 12-26

Duration: 6 months.

Type of contract: quoted time and means.

The maximum amount covering the service is: 40,000 EUR.

In the Technical offer, the style and presentation must, as far as possible, be simple and clear, and free of jargon that obscures rather than promotes meaning to readers unfamiliar with it.

Technical offer (only referring to the Section 2.2.4) shall not exceed 60 pages for each lot. The pages of the technical offer exceeding the indicated threshold will not be evaluated.

VARIANTS

Variants are not allowed.

Variant means a solution technically or economically equivalent to a model solution known to the contracting authority. Variants may relate to the whole contract or to certain parts or aspects of it.

2.2.5 SECTION FIVE: FINANCIAL OFFER

The tenders are asked to submit a financial offer, which shall consist of the Financial Offer Form (see Standard Submission Forms) indicating a single price for the financial offer.

Tenderers must provide fixed price including all fees and project related costs (project management, quality control, back-up resources, etc.) directly or indirectly connected with the provision of the service. **An indicative estimate of the volumes to be ordered for each lot over the whole duration of the framework contract is given below. These volumes are estimates only and there is no commitment as to the exact quantities to be ordered. The actual volumes will depend on the quantities, which the Contracting authority will order through specific contracts. In any case, the framework contract ceiling, i.e. the maximum amount to be spent under the framework contract, for each lot**

shall not be exceeded.

Maximum price Lot1 – 480,000 EUR

Maximum price Lot2 - 200,000 EUR

The tenderer must specify the category of staff to be involved in the project and:

- The profiles of project team and their daily fees for contribution to the project;
- Professional fees should be expressed as the number of person-days. The unit price should cover expert's fees and administrative expenditures;
- other costs shall include direct costs such as travel costs, translation expenses, any expenses for meetings' facilities or other (costs relative to the deliverables).

The contractor may not exceed the maximum indicated price while still being required to deliver in full services stipulated in the contract. The contractor shall follow the principle of good financial management and ensure value for money, i.e. quality of service at the most advantageous price. Contractor's attention shall be drawn to the article II.22 (Reimbursements) of the General Conditions for the Framework service contract.

The tenderer's attention is drawn to the following points:

- Prices must be quoted in EUROS.

- Prices should be quoted free of all duties, taxes and other charges e.g. free of VAT, as the European Institutions are exempt from such charges in the EU under Articles 3 and 4 of the protocol on the Privileges and Immunities of the European Union of 8 April 1965 (OJ L 152 of 13 July 1967). Exemption is granted to the agencies by the governments of the Member states, either through refunds upon presentation of documentary evidence or by direct exemption. For EIGE the Lithuanian national legislation provides an exemption by means of a reimbursement. The amount of VAT is to be shown separately.
- Price revision is applicable

In case of doubt about the applicable VAT system, it is the tenderer's responsibility to contact the national authorities to clarify the way in which the European Union is exempted from VAT.

The total amount referred to in the above paragraph shall be fixed and not subject to revision for the first year of performance of the Contract.

At the beginning of the second and every following year of the FWC, each price may be revised upwards or downwards at the request of one of the parties.

A party may request a price revision in writing no later than three months before the anniversary date of entry into force of the FWC. The other party must acknowledge the request within 14 days of receipt.

At the anniversary date, the contracting authority must communicate the final index for the month in which the request was received, or failing that, the last provisional index available for that month. The contractor establishes the new price on this basis and communicates it as soon as possible to the contracting authority for verification.

The contracting authority purchases on the basis of the prices in force at the date on which the specific contract enters into force. Revision shall be calculated in accordance with the following formula:

$$Pr = Po \times \left(\frac{I_r}{I_o} \right)$$

where: Pr = revised price;
 Po = price in the tender;
 Io = index for the month in which the FWC enters into force;
 Ir = index for the month in which the request to revise prices is received.

3. THE ASSESSMENT PROCEDURE

3.1 EVALUATION OF TENDERERS

Application of exclusion criteria

The (non-)exclusion of the tenderers will be evaluated on the basis of the documents submitted as indicated in Section 2.2.2 Exclusion criteria.

Contract may not be awarded to tenderers (legal or natural persons) who:

- are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information;
- are subject to a conflict of interest in connection with this contract;
- are in one of the situations leading to exclusion, as indicated in Section 2.2.2 Exclusion criteria.

In case of joint offers or/and subcontracting, the exclusion criteria will be assessed in relation to each consortium member and subcontractor individually.

If a member of a consortium is subject to exclusion, the rest of the consortium will be excluded.

If a subcontractor is subject to exclusion, the tenderer shall be excluded.

Application of selection criteria

The capacities of the tenderer to perform the contract will be evaluated on the basis of the declaration submitted as indicated in Section 0 Selection criteria.

In case of joint offers or/and subcontracting:

- For the overall turnover or turnover a consolidated assessment shall be made.
- The selection criteria will be assessed in relation to the combined capacities of all members of the group of operators and subcontractors, as a whole.

3.2 EVALUATION OF TENDERS

Verification of compliance with the minimum requirements specified in the procurement documents;

Application of award criteria

The aim is to assess, on the basis of the award criteria, the technical and financial offers and establish a ranking list in order of merit.

A. Technical evaluation

Tenders will be evaluated following the award criteria and weights outlined below, producing a potential score of maximum 100 points.

The quality of Technical Offers will be evaluated according to the following technical award criteria:

Lot 1 - Gender Equality Index - data and policy analysis for the EU and Member States

Criteria number	Quality criteria	Maximum points per criteria	Minimum required score
1.	Quality of the proposed methodology	35	20
2.	Organisation of the work and resources, including project team and national researchers, project management, coordination of tasks with sub-contractors (if applicable), timelines	25	13
3.	Quality control measures	10	5
4.	Project risk management	10	5
5.	Quality of the simulation of a technical proposal referred to the scenario (Scenario for Lot 1) . The tenderers should include in their offer: <ul style="list-style-type: none"> • Methodology for the successful completion of the specific scenario; • The project work plan, organisation of resources and allocation of days per profile. 	20	12
Total		100	55

Lot 2 – Statistical analysis related to the Gender Equality Index

Criteria number	Quality criteria	Maximum points per criteria	Minimum required score
1.	Quality of the proposed methodology	35	20
2.	Organisation of the work and resources, including project team, project management, coordination of tasks with sub-contractors (if applicable), timelines	25	13
3.	Quality control measures	10	5
4.	Project risk management	10	5
5.	Quality of the simulation of a technical proposal referred to the scenario (Scenario for Lot 2). The tenderers should include in their offer: <ul style="list-style-type: none"> • Methodology for the successful completion of the specific scenario; • The project work plan, organisation of resources and allocation of days per profile. 	20	12
Total		100	55

Tenders scored either below the minimum score required per criterion and/or below 55 out of total 100 points will be rejected and thus not be considered for the next step of the evaluation

Tenders should elaborate on all points addressed by these specifications in order to score as many points as possible. If certain essential points of these specifications are not expressly covered by the tender, EIGE may decide to give a zero mark for the relevant qualitative award criteria.

B. Financial evaluation

The evaluation of Financial Offers is based on the following formula, which applies weights on all costs indicated:

Lot 1: Price of tender = (0.1*A) + (0.25*B) + (0.15*C) + (0.45*D) + (0.05*E)

Lot 2: Price of tender = (0.1*A) + (0.30*B) + (0.45*C) + (0.15*E)

Where:

A = Daily rate of the project manager,

B = Daily rate of the senior researcher,

C = Daily rate of the senior statistician,

D = Daily rate of the national researcher,

E = Daily rate of the editor,

The sum equal to the results of adding all figures multiplied by their weights will appear in the column “Total price” of the financial offer form.

3.3 AWARD OF THE CONTRACT

AWARD PRINCIPLE

The contract(s) for each Lot will be awarded to the most economically advantageous offer on the basis of the quality / price ratio, in accordance with the following formula:

$$F = ((CP / P) \times 100 \times 30\%) + (Q \times 70\%)$$

Where:

F = Final Score for tender X (for specific Lot Y)

Q = Total quality score (out of 100) for all criteria of tender X (for specific Lot Y)

P = Price of tender X (for specific Lot Y)

CP = Cheapest Price out of all offers provided (for specific Lot Y)

The tenderer having the highest score will be awarded the contract under condition of respect of requirements on absence of conflict of interest and other requirements linked to criteria on exclusion from award.

In case of tie-break the award decision will be based on the price.

Should the outcome of the formula lead to two or more tenders with the same result, the tenders with lower price will be ranked higher than the tenders with higher price.

EIGE will inform tenderers of the decisions reached concerning the award of the contract, including the grounds for any decision not to award a contract or to recommence the procedure.

3.4 INFORMATION TO TENDERERS

After evaluation, all tenderers will be informed about whether their tender has been accepted or rejected.

The information letters will be sent electronically to the e-mail address indicated in the form “Identification of the tenderer”.

The tenderer is asked to confirm in writing, by a separate e-mail to procurement@eige.europa.eu the receipt of the information letter.

Certain information may be withheld where its release would impede law enforcement or otherwise be contrary to the public interest, or would prejudice the legitimate commercial interests of economic operators, public or private, or might prejudice fair competition between them.

3.5 STANDSTILL PERIOD

EIGE shall not sign the framework service contract(s) with the successful tenderer(s) until a standstill period of 10 calendar days has elapsed, running from the day after the simultaneous electronic dispatch of the notification on the award decision and letters to unsuccessful tenderers.

If the electronic communication fail, the notification will be re-sent immediately by letter, in which case the standstill period of 15 calendar days will apply.

3.6 NO OBLIGATION TO AWARD THE FRAMEWORK CONTRACT

The tendering procedure shall not involve EIGE in any obligation to award the framework service contract(s). EIGE may, before the contract is signed, either abandon the procurement procedure or cancel the award procedure without the Tenderers being entitled to claim any compensation.

In the event of cancellation of the tender procedure, Tenderers will be notified. In no event shall the Institute be liable for any damages in any way connected with the cancellation.

4. THE FRAMEWORK CONTRACT

4.1 NATURE OF THE FRAMEWORK CONTRACT

Following completion of this procurement procedure, single framework contract is expected to be signed between the EIGE and the selected contractor. One framework service contract per Lot will be awarded for the provision of the services of Lot 1 – 2 as specified in Technical Specifications.

The draft framework contract lays down the basic conditions applicable to any assignment placed under its terms during the period of its validity. Signature of a framework contract does not oblige EIGE to place an assignment.

The framework contract does not preclude the contracting authority from assigning tasks in the areas set out above to other contractors or from having these tasks carried out by EIGE's staff. The subject of this framework contract (FWC) is for:

Lot 1 - Gender Equality Index - data and policy analysis for the EU and Member States

Lot 2 – Statistical analysis related to the Gender Equality Index

4.2 START AND DURATION OF THE FRAMEWORK CONTRACT

The FWC enters into force on the date on which the last party signs it.

The implementation of the FWC cannot start before its entry into force.

The FWC is concluded for a period of 12 months with possible renewal of 12 months up to 3 times, with effect from the date of its entry into force.

The parties must sign any specific contract before the FWC expires.

The FWC continues to apply to such specific contracts after its expiry. The services relating to such specific contracts must be performed no later than six months after the expiry of the FWC.

4.3 PLACE OF PERFORMANCE OF THE FRAMEWORK CONTRACT

The tasks will be performed on the Contractor's premises or places indicated in the tender. Meetings between the Contractor and EIGE will be held on EIGE's premises in Vilnius. Upon agreement with the contractor, meetings can be held in other locations in Europe.

4.4 VOLUME OF THE FRAMEWORK CONTRACT

The maximum amount covering all purchases under this FWC including all renewals (if applicable) is:

- 480,000 € for Lot1
- 200,000 € for Lot2

However, this does not bind the contracting authority to purchase for the maximum amount. There is a possibility for modification of the contract without a new procurement procedure in accordance with the Article 172, par. 3 of the EU Financial Regulation, Regulation (EU, Euratom) No 2018/1046, and if the relevant conditions are fulfilled.

During the 3 years following the entry into force of the original contract, EIGE reserves the right to exercise the option of conducting a negotiated procedure without prior publication of a contract

notice for new services with the future contractor in accordance with point (e) of the second subparagraph of point 11.1(e) of Annex I to the Financial Regulation³¹.

4.5 TERMS OF PAYMENT OF THE FRAMEWORK CONTRACT

Payments shall be made in accordance with Article I.6 of the Draft Framework Contract.

Payments shall be executed only if the Contractor has fulfilled all the contractual obligations by the date on which the invoice is submitted. Payment(s) requests may not be made if an earlier payment has not been executed as a result of default or negligence on the part of the Contractor.

4.6 GUARANTEES

No guarantees are required by the Framework contract.

4.7 DATA PROTECTION

See Section I.9 in the Draft Framework Contract and the Invitation to Tender.

4.8 IMPLEMENTATION OF THE FRAMEWORK CONTRACT

The implementation of the FWC will be through Specific Contracts / Order Forms signed by both parties throughout the validity of the framework contract.

Specific contracts / Order Forms based on FWC are awarded in accordance with the terms of the FWC and only between EIGE and the contractors originally party to the FWC.

For each Specific Contract a Request for services with its specifications shall be sent by e-mail to the contractor.

Within the number of working days specified in the request for services and depending on the nature of the assignment, the contractor will provide per electronic mail the written Technical offer (if relevant) for the tasks required, and a Financial offer, based, where applicable, on the price list defined under the FWC, and with a detailed breakdown of the costs of the required task/services.

Specific Contract can be either on a Fixed Price or a Quoted Time and Means basis, in accordance with the provisions related to each order type, as specified hereafter.

Implementation of the Specific Contract may not start before the date on which it is signed by both contracting parties.

4.9 ORDER TYPES

Services shall be provided on the basis of:

- Quoted Time & Means orders which correspond to the order of a number of days for defined subtasks

³¹ Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union, amending Regulations (EU) No 1296/2013, (EU) No 1301/2013, (EU) No 1303/2013, (EU) No 1304/2013, (EU) No 1309/2013, (EU) No 1316/2013, (EU) No 223/2014, (EU) No 283/2014, and Decision No 541/2014/EU and repealing Regulation (EU, Euratom) No 966/2012, OJEU L 193/1 of 30.07.2018.

Quoted Time & Means orders

Quoted Time & Means (QTM) Orders are executed outside EIGE’s premises as a rule (i.e. off-site or extra-muros), or exceptionally at EIGE’s premises. In a Quoted Time & Means order EIGE specifies the different tasks to be executed.

The following conditions relating to Quoted Time & Means orders apply:

- In a Quoted Time & Means order EIGE specifies in the service request the different services to be provided, i.e. the different sub-tasks to be executed in a project, the total number of person-days as well as the duration of the specific contract. EIGE may also specify the required profiles.
- Unless otherwise agreed in the specific contract, the work will be normally performed off site, typically on the tenderer’s premises. If required meetings and the physical delivery of a sub-task – including acceptance process -, have to be done at EIGE’s premises.
- The contractor must present a proposal meeting the requirements as specified in the service request and associated documents (e.g. technical annex with description of sub-tasks). The offer must include a technical proposal based on the requirements, the profiles and workload (person days). The financial proposal has to be based on the profiles and their workload and be in line with the unit prices of the framework contract.
- The offer must include the list of personnel proposed for the execution of the order. The contractor’s personnel must match the requested profile description as laid down in the framework contract.
- The work is divided into various sub-tasks performed during the execution of the specific contract. EIGE will provide the contractor with a detailed description of each sub-task. The contractor will send EIGE a proposal for the execution of each sub-task (including the workload and time schedule) on the basis of a number of person-days with the requested profile(s). When agreement with EIGE has been reached, a Quoted Time and Means form must be signed by both parties. Only agreed costs for the specified sub-tasks are chargeable, after acceptance by EIGE.
- The contractual warranty applies to the sub-tasks accepted by EIGE.
- On EIGE’s demand, the contractor must replace personnel who prove incapable of carrying out the specified tasks to the required standards. The replacement personnel will be given sufficient training during an adequate handover period, so that he/she may be immediately operational when the original personnel is withdrawn. Any such replacement and training, if required, will be carried out at no additional cost to EIGE.
- The contractor shall give a month notice to EIGE of any personnel changes in the team. The prior agreement of EIGE must be obtained.
- In case of ‘force majeure’, if the original personnel is no longer able to carry out the work, the tenderer is obliged to inform EIGE, immediately provide a competent replacement personnel and arrange sufficient training (during an adequate handover period where possible) to guarantee continuity of the service provided to EIGE. Any such replacement will be effected at no additional cost to EIGE.
- In case of replacement, the contractor must propose a minimum of two replacement personnel with the equivalent qualifications and experience and as required for the profile. If the contractor does not propose suitable replacement personnel, EIGE may immediately terminate the specific contract.

- On EIGE's demand, during holidays or other periods of planned absence by the personnel employed, the contractor will be required to provide an adequate replacement. The replacement personnel will be given sufficient training and provided with all information necessary to guarantee continuity of the service provided to EIGE. All such training and handover work will be carried out at the contractor's expense.
- When personnel are no more available before the start of a new specific contract, the contractor is obliged to inform EIGE immediately and provide adequate replacement as indicated above.
- The invoicing requires the acceptance of the deliverables by EIGE's appointed Project Manager via email and is based on real workload of the profiles used in the specific contract. The request for payment of the contractor shall be admissible if accompanied by a report specifying the tasks and deliverables accepted by EIGE.