



EIGE/2021/OPER/10

TENDER SPECIFICATIONS

Survey of gender gaps in unpaid care, individual and social activities

OPEN PROCEDURE

These tender specifications provide instructions and guidance to tenderers about the nature of the offer they should submit, and shall serve as the contractor's mandate throughout project implementation. The purpose of these specifications is to ensure that the project is properly conceived by the contractor, that the work is carried out on schedule and that resources are used efficiently and not wasted.

These tender specifications will become part of the contract that may be awarded as a result of this tender.

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1 TECHNICAL SPECIFICATIONS

1.1 GENERAL BACKGROUND

The European Institute for Gender Equality (hereafter referred to as 'EIGE'¹) is a regulatory 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's activities are guided by its strategic medium-term priorities for 2021-2023 and Single Programming Documents (SPDs).

The European Institute for Gender Equality (EIGE) strives to promote gender equality in all aspects of society across Europe and beyond. Since its foundation, EIGE has developed many innovative tools and methods that have produced much needed evidence based research as well as comparable and reliable gender statistics. The tasks also involve contributing to improved policy implementation by the exchange of good practices and increased dialogue among stakeholders and EU citizens. EIGE has committed itself to provide high quality research and data to support better informed and evidence based decision-making by policy makers and other key stakeholders working to achieve gender equality.

The Gender Equality Index

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. Statistically, 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. 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 (EIGE, 2013). The Gender Equality Index measures gender gaps and takes into account the context and different levels of achievement of Member States in six core domains: work, money, knowledge, time, power, health.

Beyond the six core domains, the Index also:

- gives particular attention to intersecting inequalities. The Gender Equality Index unmask 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.
- 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.

EIGE has produced a number of reports and country factsheets based on the Gender Equality Index results, with all publications available on EIGE's website³. Starting from 2019, EIGE's Index is updated on a yearly basis and has a thematic focus. Due to the specificities of methodology, used to build a composite indicator, the issues covered by the Gender Equality Index are limited. The thematic focus typically expands analysis and discussions into the aspects not well captured by the overall Gender Equality Index. For example, the Gender Equality Index 2019 focused on work-life balance. 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, Item 2

³ <https://eige.europa.eu/gender-equality-index/publications>

thematic focus of Index release in 2020 is on digitalisation, whereas for Index release in 2021 – health, including the impact of outbreaks of infectious diseases like the coronavirus. In line with the stakeholders' needs, the thematic focus of the Gender Equality Index 2022 is set on the impact of the COVID-19 crisis on the work-life balance.

The Gender Equality Index – the domain of time

The domain of time measures gender inequality in the allocation of time to care and domestic work and social activities. It is the third lowest scoring of the six domains comprising the Gender Equality Index and is characterised by a persistent lack of progress and growing inequality. The unequal distribution of paid and unpaid work along gender lines is considered one of the root causes of gender inequality in society as a whole and in the labour market specifically, as it raises questions about women's exposure to the risk of poverty, access to decision-making and political representation.

Women's and men's engagement in unpaid care, individual and social activities remains very different within the EU. For example, as many as 38 % of women were engaged in care for children, grandchildren, older people and/or people with disabilities every day, compared to 25% of men in the EU⁴. Moreover, only 34 % of men engage in cooking and housework every day for 1 hour or more, in comparison with 78 % of women⁵. The unequal division of care and household responsibilities between women and men affects their capacity to spend time on other activities, such as sporting, cultural or leisure activities. For example, 28 % of women workers and 32 % of men workers in sporting, cultural or leisure activities and only 12 % working women and 11 % working men participate in voluntary or charitable activities in the EU. Gender gaps in time use have broader implications on women's and men's abilities to engage equally in the labour market, decision making and political representation, which distorts the overall level of economic resources that women and men have access to throughout the life course

The first subdomain of care activities measures gender gaps in women's and men's involvement in the care and/or education of their children and grandchildren and older people or people with disabilities. It also measures their involvement in cooking and housework. The commitment of time to care constrains one's possibilities to participate in the labour market and to gain equal economic independence between women and men. Research suggests that the amount of care work performed by women has decreased alongside greater participation in the labour market, although the burden of care remains disproportionately women's responsibility (EIGE, 2021). Despite the decreasing differences between women and men, this is seen as the result of women's reduced involvement rather than men's greater contribution (EIGE, 2021). Among other means, time devoted for care responsibilities could be further decreased by ensuring accessible and affordable childcare and elderly care provisions.

The second subdomain explores women's and men's engagement in social activities, i.e. participation in sporting, cultural or leisure activities outside the home, combined with their engagement in voluntary and charitable activities. Social activities encompass the time spent on all activities other than paid work (economic) and unpaid work (care), and also incorporates time spent on activities that relate to civic participation and personal development activities (EIGE, 2020). This sub-domain considers the ability of individuals to engage in leisure, political or educational activities, and their participation in organisations that include, for example, cultural or religious activities. When it comes to leisure, it appears that men enjoy a slightly higher amount of time than women (EIGE, 2020), but that the way in which this time is experienced is very different. It may be because the quality of women's leisure time is undermined by interruptions of work; by having to combine both work and care or by the pressure of domestic work that cannot be put off (EIGE, 2019).

⁴ For this and other statistics used in this paragraph see EIGE's Gender Equality Index website <https://eige.europa.eu/gender-equality-index/2020/domain/time>

⁵ EIGE's calculation, Eurofound, EQLS 2015

Up to now, the Index's domain of Time is based on Eurofound's EWCS/EQLS data. Eurofound's surveys currently suffer from data collection gaps (around 10 years) and contain only a few broad questions on the involvement in different care and household activities. An alternative time-use survey - Eurostat's Harmonised European Time Use surveys (HETUS) - also collects data only every 10 years and the EU-wide coverage is not ensured. In addition, none of these surveys is designed to measure gender gaps in unpaid care, individual and social activities from a gender equality perspective.

In 2021, EIGE will start the collection of own EU-wide, unique and more detailed survey data on gender gaps in unpaid care, individual and social activities, and will adopt gender equality and intersectional perspectives from the onset. The aim is to fill in data gaps and to improve Gender Equality Index's capacity to capture changes in the domain of Time in a more conceptually sound, coherent and regular way. The new data set will also substantially contribute to the monitoring of the EU Gender Equality Strategy 2020-2025, as closing the gender care gap is one of the key objectives of the strategy. Results of the survey will be presented in the Index 2023.

The launch of this call for tenders

To contribute to the implementation of the above mentioned tasks, EIGE launches this call for tender with a goal to conclude a contract with a professional service provider that will carry out a study to support the conceptual revision of the Time domain of the Gender Equality Index and to collect EU-wide survey data on gender gaps in unpaid care, individual and social activities.

1.2 SCOPE OF THE PROCEDURE

The study will support the conceptual revision of the Time domain of the Gender Equality Index and will collect EU-wide survey data on gender gaps in unpaid care, individual and social activities.

The expected duration for this study is 13 months following the signature of the contract by both parties.

1.3 OVERALL AND SPECIFIC OBJECTIVES

OVERALL OBJECTIVE

The overall objective of the study is to fill in data gaps in the EU policy priority area by collecting EU wide survey data on gender gaps in unpaid care, individual and social activities.

SPECIFIC OBJECTIVE(S)

The specific objective(s) are:

Specific objective 1: to improve the capacity of the Gender Equality Index to capture changes in the domain of Time in a more conceptually sound, coherent and regular way.

Specific objective 2: to support the monitoring of the EU Gender Equality Strategy 2020-2025, in particular in its priority area on closing the gender care gap.

1.4 EXPECTED RESULTS

Work package 1 – Development of conceptual framework for EIGE's survey on gender gaps in unpaid care, individual and social activities

Deliverable D1. Report presenting the conceptual framework for EIGE's survey and results of the mapping exercise

No	Activities (D1)
1.1	To develop a conceptual framework for EIGE's survey of gender gaps in unpaid care, individual and social activities (based on literature review and desk research)
1.2	To carry out a mapping exercise to identify surveys on time use and unpaid work in the EU and beyond (including gender-sensitive assessment in terms of thematic coverage, data gaps, methodological strengths and drawbacks)
1.2.1	To carry out a statistical assessment whether selected indicators could be used in the Time domain of the Gender Equality Index
1.3	To draft report presenting the conceptual framework for EIGE's survey and results of the mapping exercise

Broader description of activities

Based on data and literature review the contractor shall develop a conceptual framework to measure gender gaps in unpaid care, individual and social activities. The conceptual framework should indicate the relevance of the selected activities from a gender perspective and explain their links and effects on other domains of the Gender Equality Index. The conceptual framework should indicate key research hypotheses from the gender perspective that will form the basis of the survey questionnaire (see Work package 2).

EIGE's conceptual approach of domain of time⁶ shall be used as a starting point to develop a broader and more elaborated conceptual framework to capture gender gaps in unpaid care, individual and social activities. The following dimensions might be considered in the conceptual framework: household activities (e.g. cleaning, cooking, washing and others), care activities (e.g. childcare, caring for elderly and/or people with disabilities, home-schooling, management of children's daily tasks and other relevant dimensions such intensity of care, inside/outside household care), engagement in social activities such civic participation (e.g. voluntary, charitable and political activities) and personal development activities (e.g. doing sporting, cultural or leisure activities, resting time).

In addition, the conceptual framework shall also include the following sections:

- a dedicated section on relevant concepts and terms in relation to unpaid care, individual and social activities, from a gender equality perspective;
- a dedicated section to present and discuss different measurement designs to capture gender gaps in unpaid care, individual and social activities (such as: time diaries, questions with open numeric answers (e.g. hours spent on activities), questions with predefined answer categories (e.g. 'everyday', 'once a week' etc.)) and their methodological benefits and drawbacks as well as suitability for online panel surveys.
- an overview of conceptual and measurement challenges in relation to data collection in this area using online surveys (e.g. definition of care, cognitive difficulties for respondents to distinguish between time spent on different activities etc.)

In addition and with due attention to the developed conceptual framework, the contractor shall carry out a mapping exercise of relevant international, EU and national surveys, which contains questions on women's and men's engagement in unpaid care, individual and social activities (e.g. Eurostat HETUS survey⁷, relevant modules of Eurostat LFS and EU-SILC, Eurofound's EWCS and EQLS⁸,

⁶ See Chapter 2 of the 2013 Gender Equality Index Report <https://eige.europa.eu/sites/default/files/documents/Gender-Equality-Index-Report.pdf>

⁷ Eurostat Harmonised European Time Use Surveys (HETUS) - <https://ec.europa.eu/eurostat/web/time-use-surveys>

⁸ Eurofound European working conditions survey (EWCS) (<https://www.eurofound.europa.eu/surveys/european-working-conditions-surveys-ewcs>) and European quality of life survey <https://www.eurofound.europa.eu/surveys/european-quality-of-life-surveys>

SHARE survey, relevant national surveys⁹ and EIGE's survey on socioeconomic impacts of Covid-19 pandemic¹⁰). The contractor shall assess relevant surveys in terms of their thematic coverage, data gaps (especially gender data gaps), methodological design (including strengths and weaknesses of the methodological approach). Furthermore, the contractor shall assess relevant survey questions as regards their theoretical fitness to the proposed conceptual framework. This task shall also include an assessment of the indicators currently used in the Time domain of Gender Equality Index.

Based on the results of the mapping exercise, the contractor shall propose a list of indicators, which could be potentially used to update the Time domain of the Gender Equality Index and therefore potentially replicated in EIGE's survey. The proposed list of indicators have to be assessed as regards the following criteria:

- sex disaggregated indicator;
- harmonised at EU level and thereby comparable between Member States;
- accessible, updated on a regular basis, punctual and comparable over time;
- measures a relevant aspect of gender equality;
- focus on individuals, rather than on institutions, households or countries (for example, 'healthy life years', rather than 'health care expenditure');
- outcome variables, which measure a current status as opposed to process or input variables (for example, by selecting 'time spent on care activities', rather than 'provision of childcare services');
- accurate, measuring in a reliable way the phenomenon it intends to measure, and sensitive to change;
- comprehensive and easily interpretable, intuitive and sufficiently simple to be unambiguously interpreted in practice;
- with no more than 10 % of missing data points.

After EIGE confirms the proposed list of indicators, the contractor shall carry out statistical assessment to determine how well these indicators would fit the current framework of the Gender Equality Index¹¹. The statistical assessment shall follow the steps described in the Methodological report of the Gender Equality Index¹². EIGE will share with the contractor the Gender Equality Index data necessary for such analysis and will provide methodological advice during the process.

The report (D1) shall present the conceptual framework for EIGE's survey (activity 1.1) and results of the mapping exercise (activities 1.2 and 1.2.1). The report should establish links between different activities and discuss how well the existing surveys (indicators) match the developed conceptual framework as well as identify remaining gaps, which could be covered by EIGE's survey.

Timelines: EIGE shall have two (2) weeks from the date of receipt of deliverable(s), to approve or reject in full or in part D1. The contractor shall have five (5) working days from the date of receipt of EIGE's comments and/or requests for clarifications to address them and submit additional information/clarifications/another version of deliverable(s)/the final version the deliverable(s).

Size of the deliverable(s): max 30 pages, without annexes and bibliography, in English, electronic version.

Work package 2 – Development of the survey questionnaire

⁹ E.g. The latest time-use survey conducted in Portugal

http://cite.gov.pt/asstscite/downloads/publics/INUT_livro_digital.pdf

¹⁰ EIGE will share the methodology, questionnaire and microdata of the survey with the contractor.

¹¹ Activity 1.2.1. might require the analysis of Eurostat, Eurofound (or other data providers) microdata, therefore the contractor should be able to access relevant microdata (e.g. be recognized research entity).

¹² For more details see Chapter 2 in the Gender Equality Index 2017: Methodological report. The report can be found here: <https://eige.europa.eu/publications/gender-equality-index-2017-methodological-report>

Deliverable D2.1: First version of the draft questionnaire for EIGE's survey of gender gaps in unpaid care, individual and social activities
Deliverable D2.2: Second version of the draft questionnaire to be presented to external stakeholders
Deliverable D2.3: A stakeholders' consultation strategy
Deliverable D2.4: Updated conceptual framework and final draft questionnaire for EIGE's survey of gender gaps in unpaid care, individual and social activities

No	Activities (D2)
2.1	To develop a first version of a draft questionnaire (D2.1) for EIGE's survey of gender gaps in unpaid care, individual and social activities
2.2	To prepare a revised draft questionnaire (D2.2) for stakeholder's feedback
2.3	To develop stakeholder's consultation strategy and support EIGE in carrying out consultations with stakeholders to discuss the conceptual framework and draft questionnaire
2.4	To update the conceptual framework and prepare the final draft questionnaire for EIGE's survey of gender gaps in unpaid care, individual and social activities, taking into account the feedback received from consultations with stakeholders

Broader description of activities

Draft questionnaire. The contractor will prepare the draft survey questionnaire ensuring the adequate coverage of the developed conceptual framework in Deliverable D.1. The overall aim of the questionnaire is to collect data on gender gaps in unpaid care, individual and social activities. At a minimum the questionnaire shall:

- Include existing questions related to the four indicators currently used in the Gender Equality Index Domain of Time (from EWCS and EQLS) relating to unpaid care, social and leisure activities¹³.
- Develop additional and unique questions to collect data on women's and men's engagement in unpaid care, individual and social activities, in line with the conceptual framework developed in Deliverable D.1. The development of new questions, should also consider the possibility to modify the four existing questions (indicators) in light of the developed conceptual framework.

The questionnaire shall take into account, to the extent possible, the limitations and shortcomings identified with the current measurement of the domain of time and be in line with recent research on gender gaps in unpaid care, individual and social activities. The contractor shall ensure quality, innovativeness and value-added of the survey questionnaire.

The questionnaire should also collect data on necessary demographic characteristics (i.e. age, country of birth, dis/ability, educational level, family type) in order to enable intersectional analysis of results,

¹³ The four indicators currently making up the domain of time of the Gender Equality Index are the following:

Care activities: 1.) People caring for and educating their children or grandchildren, elderly or people with disabilities, every day (% , 18+ population), Eurofound, EQLS; 2.) People doing cooking and/or housework, every day (% , 18+ population), Eurofound, EQLS.

Social activities: 1.) Workers doing sporting, cultural or leisure activities outside of their home, at least daily or several times a week (% , 15+ workers). Eurofound, EWCS; 2.) Workers involved in voluntary or charitable activities, at least once a month (% , 15+ workers), Eurofound, EWCS.

following the Gender Equality Index methodology¹⁴. The contractor should consider to use similar demographic questions as in other EU-wide surveys (LFS, EU-SILC, EWCS, EQLS), in order to assure comparability. Proposals to collect data on additional intersections are welcome if they are clearly justified and feasible.

The draft questionnaire shall contain a separate section/box for each question that would briefly explain the conceptual rationale of each question and potential hypothesis as regards gender equality, the rationale of proposed measurement (e.g. selection of specific scales), indicate any relevant links with other surveys (e.g. whether the same question was used in other surveys) and any other relevant information to better understand the logic and the rationale (in the context of the conceptual framework) of the proposed questions.

The questionnaire should be designed for an online survey of 15 minutes duration.

Stakeholder consultations. The contractor will prepare a stakeholder consultation strategy describing its approach to gather feedback from external stakeholders on the conceptual framework and the revised draft questionnaire (D.2.2) through online consultations. The strategy should include, at a minimum:

-the contractor's approach:

- to support EIGE in organising at least 3 group consultations with up to 8 participants (excluding EIGE's and Contractors' staff) from various relevant stakeholder's groups (e.g. researchers, policy stakeholders and civil society organisations);
- to categorise and analyse feedback to maximise its usefulness and relevance for the finalisation of the questionnaire and the conceptual framework. Including a meeting with EIGE to discuss the changes proposed for the questionnaire and the conceptual framework, based on the feedback received from stakeholders.

EIGE will organise the meetings and take care of logistical aspects such as sending invitations and reminders, moderating the discussions and sending thank you notes. The contractor will support EIGE in the identification of relevant stakeholders, preparing background documents for the meeting (e.g. discussion paper with key points for discussion, meeting agenda), preparing power point presentations and detailed minutes of the consultations.

Proposals from the contractor to run additional stakeholder consultations (e.g. external expert peer-reviews) are welcome, they are clearly justified and feasible.

Update of the conceptual framework and preparation of the final draft questionnaire. Based on the feedback received from stakeholder consultations and agreements made with EIGE, the contractor will have to update the conceptual framework and prepare the final draft survey questionnaire. The final draft version of the questionnaire will be used in cognitive interviews, technical testing and piloting which might result in some additional changes in the questionnaire (see Work package 3 for more details).

Timelines: EIGE shall have two (2) weeks from the date of receipt of each deliverable(s), to approve or reject in full or in part D 2.1, D.2.2, D. 2.3, D.2.4. The contractor shall have five (5) working days from the date of receipt of EIGE's comments and/or requests for clarifications to address them and submit additional information/clarifications/another version of deliverable(s)/the final version the deliverable(s).

¹⁴ More information on intersectional analysis used in the Gender Equality Index can be found here: https://eige.europa.eu/sites/default/files/documents/mho218295enn_002.pdf

Size of the deliverable(s): D2.1 and D2.2 should be designed for an online survey of 15 minutes duration. Max 20 pages for first draft (D2.1), second draft (D2.2) and final draft (D2.4) questionnaires, maximum 20 pages for the stakeholders' consultation strategy (D2.3). All deliverables should be submitted in English, electronic version.

Work package 3 – Online panel survey to collect EU-wide data on gender gaps in unpaid care, individual and social activities

Deliverable D3: Online panel survey on time use and unpaid work, covering 27 Member States, with a total sample size of at least 60,000 respondents
Deliverable D3.1: Survey methodology
Deliverable D3.2: Translated questionnaire (online version, all languages)
Deliverable D3.3: Full raw and clean dataset per country in its original language and one full data set of all results including weights in English (Excel, Stata or SPSS files)
Deliverable D3.4: Codification manual of the survey
Deliverable D3.5: Methodology report of the survey, including software codes (do-files) used to produce analysis
Deliverable D3.6: Analytic report presenting country-level and EU-level analysis of survey results

No	Activities (D3)
3.1	To design and conduct an online panel survey
3.2	To analyse the online panel survey data from gender and intersectional perspectives
3.3	To document the methodology used to conduct the online panel survey
3.4	To deliver raw and cleaned data of the online panel survey
3.5	To draft analytic report presenting country-level and EU-level analysis of survey results

Broader description of activities

Survey target, coverage and sampling design.

The average length of the survey shall be up to 15 minutes and the target population shall be general population (aged 18+). The survey coverage will include all EU-27 Member States, where at least 60,000 individuals (i.e. about 2000 per country) from the target population will be surveyed (responses). If needed, sample could be enlarged for bigger and/or federal/regional countries, to assure representativeness at territorial level. The contractor should propose a sample stratification approach. Ensuring coverage of certain population groups (intersectional analysis) is of high importance to this study. Sample stratification approach should allow to collect relevant information for the Gender Equality Index purposes. The contractor is welcome to propose measures on how the coverage of certain hard-to-reach population groups (e.g. migrant populations) could be improved.

In order to calculate sample quotas, the contractor should be able to access Eurostat microdata (be recognized research entity). The request for microdata should be submitted to Eurostat immediately after inception report.

The contractor should present their methodological and practical proposal for the implementation of the online panel survey, including approach for the sample stratification and for the calculation of appropriate weights to ensure representativeness of the sample relative to the general population.

The latter proposal should at minimum also discuss cognitive and technical testing of the final draft questionnaire (D2.4).

Cognitive interviews to test the final draft questionnaire. The contractor shall carry out cognitive interviews to better understanding the cognitive processes that the respondent engages in when answering a question. During in depth one-on-one interviews, the contractor must go through the questionnaire with at least five respondents (representing different sociodemographic characteristics) and ask them about each questionnaire item. This exercise should allow to identify:

- Whether respondents had any problems with comprehending any of the questions (including the reference points, specific wording and scales).
- Whether respondents think in similar terms as used in the questionnaire.
- Whether respondents felt they were unable to answer any questions due to lack of information or finding it difficult to recall (e.g., over a long period of time).
- Whether all scales and response categories fully covered the full range of likely responses.

The contractor shall present results of cognitive interviews to EIGE. Based on the agreements made with EIGE, the contractor should adjust the final draft questionnaire accordingly.

Technical testing of the questionnaire. The contractor must ensure that the questionnaire works well on the online survey tool as a minimum shall implement the following steps:

- Review of the technical implementation and debugging, which includes testing the survey branching, validation of responses and filters, as well as making relevant questions compulsory.
- Ensuring survey stability across browsers and operating systems, by testing and reviewing visual displays, correct functioning of features/ responses and other aspects on computers (Windows and macOS, different browsers), tablets and smartphones (Android and iOS).
- The contractor should enable EIGE to access the online questionnaire for additional quality assurance.

Translation of the questionnaires. The contractor shall propose the approach for translations to ensure that the questionnaire is translated into host country languages. The contractor should indicate how countries with multiple languages will be approached and are welcome to propose well-justified additional translations to ensure the coverage of major ethnic minority and migrant populations from non-EU countries.

The translations shall be carried out by professional native-speaker translators and afterwards subsequently proofread by a second native speaker translator of each language. A linguistic and cultural quality check needs to be performed in order to guarantee an adequate correspondence with the source questionnaire while taking into account local specificities. Gender sensitivity of translated questionnaires shall be also ensured.

Whenever feasible and relevant, the contractor shall ensure that the translation of the key terminology used in the survey are in line with the translations used by Eurostat (National Statistics Institutes) and/or other EU bodies³⁵.

Piloting of the online survey. Pilot of the online survey with a small sub-group of the sample (minimum 25 valid testers per country); quality check and reporting with recommendations for its improvement; fine tuning of the questionnaire and online tool where appropriate. As a minimum the following aspects have to be assessed after collection of pilot survey data:

³⁵ For example, translations to all EU languages of the EWCS and EQLS questionnaires are available on Eurofound website.

- *Response distributions.* To assess whether there are any distributions that are counterintuitive knowing the results of earlier surveys, presenting irregular distributions, or with a large share of 'Do not know/ Not applicable'.
- *Survey paradata.* To assess the overall time spent on survey, time spent on each page, and if there is a trend in the points of survey termination in incomplete responses.
- *Technical aspects.* To check whether all responses are recorded/exported properly and if they follow the questionnaire logic/ branching.

The contractor shall present piloting results to EIGE. Based on the agreements made with EIGE, the contractor should adjust translated questionnaires accordingly (which might imply additional translations and/or technical testing of the questionnaire(s)).

Implementation of the survey. All final translated questionnaires will have to be submitted to EIGE (D3.2). A possibility to choose the language of the questionnaire (from all translated questionnaires) shall be ensured to all respondents. All the translated questionnaires will be collected by means of the online system and compiled in datasets (one dataset per country in its original language(s) and compatible with/exportable to Stata or SPSS). Furthermore, a common dataset in English with all responses from all countries will also be provided by the Contractor. All datasets will have a common codification. The contractor must closely monitor the fieldwork by observing the progress of the survey and by detecting any potential issues (e.g. server performance and technical errors, unusually high breakoff rates in certain pages, fraudulent respondents, etc.). The latter observations should be collected and included in the methodological report (D3.5).

Data cleaning, validation and codification. The data will be fully cleaned and validated before proceeding with the analysis. A codification manual of all datasets will be provided by the contractor. The dataset with all countries and responses will include weights in order to allow performing analyses at EU level or at country level. As a minimum, the following quality checks have to carry out:

- Identification and removal of partial responses.
- Identification and removal of duplicate responses.
- Checks to detect poor-quality responses (e.g. identification of straight-lining answer patterns, 'speeding' behaviours).
- Other advanced validations and/or logic tests (e.g. finding interrelated variables and making logical checks that are used to find errors or inconsistencies).

After cleaning and validation procedures the dataset shall contain at least 60 000 good quality responses. If the number of good quality responses in the dataset is lower than 60 000, the contractor shall collect additional responses.

Reporting on survey methodology. All the methodological aspects related to the design and implementation of the online survey will have to be documented and reported. Relevant syntax/do-files of statistical software used for data cleaning, codification and data analysis will have to be submitted as deliverables to EIGE (as a part of D3.5).

Analysis and reporting at EU level and MS level. The contractor will have to apply a coherent approach to analyse survey data on country level and EU level. The results of the study will have to be presented in analytical report (D3.6). The analytical report shall contain chapter(s) presenting unique survey results and separate chapter(s) dedicated to questions related to the four variables currently used in the Gender Equality Index Domain of Time (from EWCS and EQLS) relating to unpaid care, social and leisure activities. The analytical report should provide insights on what evidence the collected data bring on the hypotheses.

Note on data protection rules

The Contractor shall comply strictly with the national and EU data protection legislation, especially General Data Protection Regulation (GDPR) (Regulation (EU) 2016/679), Regulation (EU) 2018/1725, as well as regulation EC No. 223/2009 on the processing of data for statistical purposes. In particular, data collected in cognitive interviews and in online panel survey carried out with individuals in respect of their personal experiences will be processed anonymously, ensuring that the person cannot be identified.

EIGE shall be informed promptly by the Contractor of any request of access and rectification that they receive directly from data subjects. The Contractor shall await instructions from EIGE before responding to any such request, and shall act promptly upon receiving instructions from EIGE. All procedures concerning storage, processing and transfer of data shall comply with the highest standards for information security and data protection.

The Contractor must only act on the written instructions of the controller (EIGE); must ensure that people processing the data are subject to a duty of confidentiality; must take appropriate measures to ensure the security of processing (e.g. data protection by design and by default); must assist EIGE in demonstrating compliance with the Data Protection Regulation; must inform EIGE immediately if the instruction provided infringes the new Regulation or other data protection law of the EU or of a Member State.

The retention period shall be determined during project implementation, so that relevant data is not to be deleted before all quality checks have been done, and any questions from EIGE have been resolved.

Timelines: EIGE shall have two (2) weeks from the date of receipt of deliverable(s), to approve or reject in full or in part D3.1-D3.6. The contractor shall have ten (10) working days from the date of receipt of EIGE's comments and/or requests for clarifications to address them and submit additional information/clarifications and the final version of the deliverable(s).

Size of the deliverable: D3.6 Analytic report presenting country-level and EU-level analysis of survey results – max 30 pages without annexes and bibliography, in English, electronic version. The deliverable included data and it corresponding visuals should be provided in Excel format.

Work package 4 – Final report presenting main research findings

Deliverable D4: final report presenting main research findings

No	Activities (D4)
4.1	To synthesize results from work packages 1, 2 and 3
4.2	To draft final report presenting main research findings

Broader description of activities

The final report (D4) shall combine evidence and findings from all relevant deliverables from work packages 1, 2 and 3. As minimum the report should present:

- Executive summary;
- Rationale and policy relevance of the project;
- Developed conceptual framework for EIGE's survey of gender gaps in unpaid care, individual and social activities (including the summary of results of the mapping exercise);
- Summary of the methodology used to implement online panel survey
- Analytical chapters presenting survey results:
 - o Chapter(s) presenting of unique survey results

- Chapter(s) presenting questions related to the four variables currently used in the Gender Equality Index Domain of Time (from EWCS and EQLS) relating to unpaid care, social and leisure activities.
- Conclusions (with an assessment whether the online panel survey allowed to collect good quality data for the purposes of the Gender Equality Index).
- Relevant annexes

Size of the deliverable(s): D4: Final report presenting steps and results of the project - max 60 pages (excluding annexes), in English, electronic version.

Timelines: EIGE shall have two (2) weeks from the date of receipt of deliverable(s), to approve or reject in full or in part D4. The contractor shall have five (5) working days from the date of receipt of EIGE's comments and/or requests for clarifications to address them and submit additional information/clarifications and the final version of the deliverable(s).

1.5 DETAILS ON DELIVERABLES. PROGRESS REPORTS

The reports 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://op.europa.eu/en/publication-detail/-/publication/e774ea2a-ef84-4bf6-beg2-c9ebef91c1b>

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> and also EIGE's writing guide <https://eige.europa.eu/publications/eige-writing-guide>

If graphs/infographic elements are used, they should be provided in editable formats, for example: MS 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.

The procedure for accepting the deliverables shall be as follows (if not foreseen differently for specific deliverables). EIGE receives the deliverables according to the contract deadlines. 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 acceptance of the deliverables will be implemented by the contractor without delay. A new deliverable which takes into account comments and suggestions made by EIGE should be re-submitted within the agreed deadline, but not later than within 5 working days. The deliverable is considered as a final deliverable only after its acceptance by EIGE.

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

Minimum requirements

- the offer must present a proposal how the study will follow the requested and/or suggested methods of research (i.e. literature review, stakeholder consultations, online panel survey, statistical analysis);
- the offer must present the organisation of the work and resources, including quality assurance shall be proposed;
- the online panel survey shall cover all EU Member States with a total sample size of at least 60,000 respondents;
- the duration of the study may not exceed 13 months, the length of deliverables may not exceed the indicated number of pages.

Progress reports

Inception report

Within two (2) weeks of signing the contract, EIGE will organise an online inception meeting (A1) with the Contractor to discuss the Technical Specifications and the contractor's offer. The project manager and senior researchers from the Contractor's team shall attend the meeting.

In the inception meeting (A1), the Contractor will present in detail the methodology for data collection and analysis to be used, analytical tools, how the methods proposed are going to be implemented in light of the initial assessment of available information and data, and in particular, how the specific activities will be implemented.

The contractor will also present the results of the initial analysis, including:

- Main findings of the preparatory work undertaken;
- Proposal of the methodological approach to be used and the problems encountered;
- Data to be collected from different sources;
- Information on the team members and their contact details, including the list of national researchers covering selected EU Member States;
- Updated work-plan ensuring the submission of the deliverables within the contractual deadlines.

Based on the agreements reached during the meeting, the Contractor will draw up an Inception report (A2), which should be submitted to EIGE for approval within five (5) working days of the inception meeting (A1). The Inception report (A2) will present the organisation of work, the planning and timeline for all activities of the project within the contractual deadline and will list any other agreements made during the inception meeting.

Timelines:

The Contractor should prepare an Inception report (A2) summarising the elements above and submit it to EIGE no more than five (5) working days after the inception meeting. EIGE will have five (5) working days from receipt to approve or comment on the report. Within five (5) working days of receiving EIGE's comments, the Contractor shall submit additional information, as well as the revised Inception report.

Size of the inception report: Maximum 7 pages without annexes, in English, electronic version.

Interim report 1

Within eighteen (18) weeks after signing of the contract the Contractor will provide the first interim report (A3) to EIGE and participate in an online meeting with EIGE (A4). The Project Manager and at least one of the senior researchers shall participate in the meeting (A4). In the first interim meeting

(A4), the Contractor will present findings in relation to Work package 1, the first draft survey questionnaire (D2.1) and the progress towards other work packages, problems encountered and proposed solutions and an updated work plan.

The Interim report (A3) will be submitted to EIGE a week before the Interim meeting and will present the work in progress, including:

- Implemented, ongoing and planned activities of work packages 1-4;
- An updated work plan that would ensure the submission of further deliverables within the contractual deadlines.

Based on the agreements reached during the first interim meeting (A4), the Contractor will draw up minutes of the interim meeting.

Timelines:

The first interim report (A3) shall be submitted to EIGE by week 18 - a week before the first interim meeting (A4). EIGE shall have two (2) weeks from the date of receipt of the first Interim report (A3) to approve or comment on it. The contractor shall have five (5) working days from the date of receipt of EIGE's comments and/or requests for clarifications to address them and submit additional information/clarifications and the final version of the first interim report.

The contractor shall prepare meeting minutes and submit them to EIGE no more than five (5) working days after the first interim meeting (A4). EIGE will have five (5) working days from receipt to approve or comment on the minutes.

Size of the interim report: Maximum 10 pages without annexes, in English, electronic version.

Interim report 2

Within thirty-two (32) weeks after signing of the contract the Contractor will provide the second Interim report (A5) to EIGE and participate in an online meeting with EIGE (A6). The Project Manager and at least one of the senior researchers shall participate in the meeting (A6). In the Interim meeting (A6), the Contractor will present findings in relation to Work package 2 and the progress towards other work packages, problems encountered and proposed solutions and an updated work plan.

The interim report (A5) will be submitted to EIGE a week before the second interim meeting and will present the work in progress, including:

- Implemented, ongoing and planned activities of work packages 1-4;
- An updated work plan that would ensure the submission of further deliverables within the contractual deadlines.

Based on the agreements reached during the second interim meeting (A6), the Contractor will draw up minutes of the interim meeting.

Timelines:

The second interim report (A5) shall be submitted to EIGE by week 32 - a week before the second interim meeting (A6). EIGE shall have two (2) weeks from the date of receipt of the second Interim report (A5) to approve or comment on it. The contractor shall have five (5) working days from the date of receipt of EIGE's comments and/or requests for clarifications to address them and submit additional information/clarifications and the final version of the first interim report.

The contractor shall prepare meeting minutes and submit them to EIGE no more than five (5) working days after the second interim meeting (A6). EIGE will have five (5) working days from receipt to approve or comment on the minutes.

Size of the interim report: Maximum 10 pages without annexes, in English, electronic version.

Interim report 3

Within forty-six (46) weeks after signing of the contract the Contractor will provide the third interim report (A7) to EIGE and participate in an online meeting with EIGE (A8). The Project Manager and at least one of the senior researchers shall participate in the meeting (A8). In the third interim meeting (A8), the Contractor will present findings in relation to Work package 3 and the progress towards other work packages, problems encountered and proposed solutions and an updated work plan.

The third interim report (A7) will be submitted to EIGE a week before the second interim meeting and will present the work in progress, including:

- Implemented, ongoing and planned activities of work packages 1-4;
- Proposal of the structure of the final report;
- An updated work plan that would ensure the submission of further deliverables within the contractual deadlines.

Based on the agreements reached during the second interim meeting (A8), the Contractor will draw up minutes of the interim meeting.

Timelines:

The third interim report (A7) shall be submitted to EIGE by week 46 - a week before the second interim meeting (A8). EIGE shall have two (2) weeks from the date of receipt of the second Interim report (A7) to approve or comment on it. The contractor shall have five (5) working days from the date of receipt of EIGE's comments and/or requests for clarifications to address them and submit additional information/clarifications and the final version of the first interim report.

The contractor shall prepare meeting minutes and submit them to EIGE no more than five (5) working days after the second interim meeting (A8). EIGE will have five (5) working days from receipt to approve or comment on the minutes.

Size of the interim report: Maximum 10 pages without annexes, in English, electronic version.

1.6 INPUT BY THE CONTRACTING AUTHORITY

EIGE will work closely with the contractor to provide the 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, EuroGender);
- Contact person as project manager as well as for specific activities (Communication).

1.7 GENERAL GUIDANCE ON METHODOLOGY

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 to these tender specifications). Tenderers need to ensure that the research team has a sufficient number of members to fulfil the requirements listed below in terms of qualifications and experience.

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:

- Project manager (1)
- Senior researchers (at least 2)
- Researchers (at least 4)
- Statistician (at least 1)

Project manager (1)

The project manager is responsible for the coordination and administrative tasks of the project, 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 of the study and other relevant aspects of the work. The full team is responsible for the content and quality of all deliverables. The project manager and senior researchers must participate in meetings with EIGE and must sign all deliverables.

The project manager shall sign a declaration of exclusivity, availability and conflict of interest (see Standard Submission Forms) declaring that she/he will only join this technical offer and project (ref. Section 2.2.1 of these specifications) and 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.

Envisaged tasks (non-exhaustive list)	Qualifications and professional experience must include	Estimated working time for the profile
<ul style="list-style-type: none"> - Carry-out overall responsibility for the content and quality of all deliverables; - General follow-up of all administrative tasks related to the project; - Plan and manage human and financial resources; - Ensure full cooperation within the team; 	<ul style="list-style-type: none"> - University degree; - Minimum of 5 (five) 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 research projects; 	<p><u>1 person x 42 working days</u></p>

<ul style="list-style-type: none"> - Define tasks and deliverables, 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. 	<ul style="list-style-type: none"> - Proven experience in the areas of gender equality; - Proven experience of analysis, assessment and evaluation of broad range of deliverables; - Excellent knowledge of English (at least level C1 based on the Common European Framework of Reference for Languages). 	
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Senior researcher in gender equality (1)

Statement of exclusivity, availability and conflict of interest

The senior researcher shall sign a declaration of exclusivity, availability and conflict of interest (see Standard Submission Forms) declaring that she/he will only join this technical offer and project (ref. Section 2.2.1 of these specifications) and 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.

Envisaged tasks (non-exhaustive list)	Qualifications and professional experience must include	Estimated working time for the profile
<ul style="list-style-type: none"> - Carry out the research activities within the project in close cooperation with the Project manager and all members of the team; - Develop conceptual framework and the questionnaire for EIGE's survey; - Carry out a mapping exercise to identify surveys on time use and unpaid work in the EU and beyond; - Develop stakeholder consultation strategy and supporting materials; - Analyse EIGE's online panel survey data; - Draft deliverables; - Integrate EIGE's ad-hoc comments on activities and deliverables in a clear and timely manner; - Ensure the quality of deliverables; - Participate in meetings with EIGE or other events related to the project. 	<ul style="list-style-type: none"> - University degree in social sciences, preferably Master or PhD level, with significant gender studies component; - Minimum of five (5) years of research experience in gender equality (preferably with a focus on unpaid work and/or time use); - Demonstrated experience with some of the envisaged tasks, such as development of conceptual frameworks and survey questionnaires; - At least three (3) publications (including articles or published reports of research projects) on gender equality (preferably with a focus on unpaid work and/or time use); - Proven experience in supervising or collaborating in at least three (3) 	<u>1 person x 67 working days</u>

	international or European research projects; -Excellent knowledge of English (at least level C1 based on the Common European Framework of Reference for Languages).	
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Senior expert in survey design and survey data analysis (1)***Statement of exclusivity, availability and conflict of interest***

The senior researcher shall sign a declaration of exclusivity, availability and conflict of interest (see Standard Submission Forms) declaring that she/he will only join this technical offer and project (ref. Section 2.2.1 of these specifications) and 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.

Envisaged tasks (non-exhaustive list)	Qualifications and professional experience must include	Estimated working time for the profile
<ul style="list-style-type: none"> - Carry out the research activities within the project in close cooperation with the Project manager and all members of the team; - Develop conceptual framework and the questionnaire for EIGE's survey; - Contribute to statistical analysis of selected indicators - Design and conduct EIGE's online panel survey (including cognitive interviews, technical testing of questionnaire and piloting etc.); - Analyse EIGE's online panel survey data; - Draft deliverables; - Integrate EIGE's ad-hoc comments on activities and deliverables in a clear and timely manner; - Ensure the quality of deliverables; - Participate in meetings with EIGE or other events related to the project. 	<ul style="list-style-type: none"> - University degree in social sciences, preferably Master or PhD level, with significant quantitative analysis component; - Minimum of five (5) years of social research experience (preferably with a focus on gender issues); - Demonstrated experience with quantitative data analysis, including working with survey microdata; - Demonstrated experience in developing survey methodological designs and questionnaires; - At least three (3) publications (including articles or published reports of research projects) based on statistical analysis (preferably with a focus on gender issues); - Proven experience in supervising or collaborating in at least three (3) international or European research projects; - Excellent knowledge of English (at least level C1 based on the Common European Framework of Reference for Languages). 	<u>1 person x 68 working days</u>

Statistician (1)***Statement of exclusivity, availability and conflict of interest***

The statistician shall sign a declaration of exclusivity, availability and conflict of interest (see Standard Submission Forms) declaring that she/he will only join this technical offer and project (ref. Section 2.2.1 of these specifications) and 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.

Envisaged tasks (non-exhaustive list)	Qualifications and professional experience must include	Estimated working time for the profile
<ul style="list-style-type: none"> - Carry-out statistical analysis of selected indicators - Develop and implement methodology for online panel survey - Analyse data of online panel survey - Document the methodology used to conduct the online panel survey; - Deliver raw data of the online panel survey; - Draft research reports and other deliverables; - Integrate EIGE's ad-hoc comments on activities and deliverables in a clear and timely manner. 	<ul style="list-style-type: none"> - University degree in statistics, mathematics or social sciences (with a significant quantitative component); - Minimum of three (3) years of experience in large-scale survey implementation, data analysis in social statistics (preferably linked with gender equality issues); - Proven experience in work with survey microdata and with raw survey datasets (cleaning and validating data). - Proven experience in collaborating in at least three (3) international or European research projects, each involving data collection through surveys. - Excellent knowledge of English (at least level C1 based on the Common European Framework of Reference for Languages). 	1 person x 50 working days

Researchers (4)

Envisaged tasks (non-exhaustive list)	Qualifications and professional experience must include	Estimated working time for the profile
<ul style="list-style-type: none"> - Carry out the research activities within the project in close cooperation with the Project manager and all members of the team; - Support senior researchers in different project activities; - Draft research reports and other deliverables of the current study. 	<ul style="list-style-type: none"> - University degree in social sciences. - Minimum of three (3) years of experience in gender equality research. - At least two (2) publications (including articles or reports of research projects) linked with gender equality issues; - Demonstrated experience with some of the envisaged tasks, such as qualitative and/ or quantitative 	4 persons x 32 working days

	data analysis, stakeholder consultations, survey questionnaire development, microdata analysis. - Proven experience in supervising or collaborating in at least one (1) international or European research project. - Excellent knowledge of English (at least level C1 based on the Common European Framework of Reference for Languages).	
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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. 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 implementation of the contract.

Each deliverable, represented in contractor's financial offer, will be subject to a written quality assessment. A low quality of the specific deliverables may lead to reduction of payment proportionally to the failure up to 30% of the total cost for the deliverable in accordance with the Articles II.15; 16 with the Contract. 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.

All deliverables must comply with the requirements set out in the technical specifications. In particular, they will have to fulfil the following:

1. Respect of deadlines
2. Quality, consistency, coherence and relevance of the content;
3. Quality of language and proofreading;
4. Timely introduction of all recommendations and improvement requirements provided by EIGE, during the assessment of each deliverable.

1.10 GENERAL DELIVERY TIME

Provisional timeline:

	Deliverable/Progress report	Deadline
D1	Report presenting the conceptual framework for EIGE's survey and results of the mapping exercise	Draft – W12 Final – W16
D2.1	First draft questionnaire for EIGE's survey of gender gaps in unpaid care, individual and social activities	W16
D2.2	Revised draft questionnaire to be presented to external stakeholders	W22

D2.3	A stakeholders' consultation strategy	W16
D2.4	Final questionnaire for EIGE's survey of gender gaps in unpaid care, individual and social activities	W26
D3.1	Survey methodology	W18
D3.2	Translated questionnaire (online version, all languages)	W28
D3.3	Full raw and clean dataset per country in its original language and one full data set of all results including weights in English (Excel, Stata or SPSS files)	W42
D3.4	Codification manual of the survey	W44
D3.5	Methodology report of the survey, including software codes (do-files) used to produce analysis	W44
D3.6	Analytic report presenting country-level and EU-level analysis of survey results	W46
D4	Final report presenting steps and results of the project	W50

Provisional indicative timeline for progress reports and meetings is foreseen as following:

	Progress report	Deadline
A1	Inception meeting (online)	W2
A2	Inception report	W2+5 working days
A3	1st Interim report	W16
A4	1st Interim meeting (online)	W17
A5	2nd Interim report	W26
A6	2nd Interim meeting (online)	W27
A7	3rd Interim report	W46
A8	3rd Interim meeting (online)	W47

The number of the week is calculated based on the weeks after signature of the contract with EIGE.

The contractor is required to regularly exchange information with EIGE in the form of telephone calls, emails on the production of required outputs and meetings. The indicative timeline could be modified during the contract implementation. The agreement shall be documented in the minutes and/or reports and/or communication records (e.g. emails).

1.11 PAYMENTS AND IMPLEMENTATION PROGRESS

Payments will be made in three parts and within thirty (30) days after receipt of the invoice by EIGE and according to the provisions of the draft contract (purchase order).

The **1ST interim payment of 30%** will be made upon receipt of deliverables and approval by EIGE. The deliverables to be approved by EIGE for the first interim payment: A2 – Inception report, A3 – 1st interim report and deliverables D1, D2.1, D2.3.

The **2ND interim payment of 50%** will be made upon receipt of deliverables and approval by EIGE. The deliverables to be approved by EIGE for the second interim payment: A5 – 2nd Interim report, A7 – 3rd interim report and deliverables D2.2, D2.4, D3.1, D3.2, D3.3, D3.4, D3.5, D3.6.

The **final payment of the balance** will be made upon receipt of deliverables and approval by EIGE. The deliverables to be approved by EIGE for the final payment: D4 – final report.

Payments shall be executed only if the Contractor has fulfilled all the contractual obligations by the date on which the invoice is submitted. Payment 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.

1.12 INTELLECTUAL PROPERTY RIGHTS

In accordance with Article II.13 of the draft 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 Contract Article I.10.

1.13 PARTS OF THE RESULTS OF PRE-EXISTING RIGHTS

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.

1.14 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.

1.15 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) The 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.

1.16 COMPLIANCE WITH MINIMUM REQUIREMENTS AND 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 research 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.

By submitting a tender a tenderer commits to perform the contract in full compliance with the terms and conditions of the procurement documents for this call for tender. Particular attention is drawn to the minimum requirements specified in Section 1.5 of these specifications.

The minimum requirements shall be observed throughout the entire duration of the contract. Compliance with these requirements is mandatory and cannot be subject to any assumptions, limitations, conditions, or reservations on the part of a tenderer. Tenders that are not compliant with the applicable minimum requirements shall be rejected.

1.17 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.

1.18 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 incompliant 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 TENDERS

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 countries 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.

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.

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.).

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 subcontracted.

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.

The following shall not be considered subcontracting:

- a) Use of workers posted to the contractor by another company owned by the same group and established in a Member State ("intra-group posting" as defined by Article 1, 3, (b) of Directive 96/71/EC concerning the posting of workers in the framework of the provision of services).
- b) Use of workers hired out to the contractor by a temporary employment undertaking or placement agency established in a Member State ("hiring out of workers" as defined by Article 1, 3, (c) of Directive 96/71/EC concerning the posting of workers in the framework of the provision of services).
- c) Use of workers temporarily transferred to the contractor from an undertaking established outside the territory of a Member State and that belongs to the same group ("intra-corporate transfer" as defined by Article 3, (b) of Directive 2014/66/EU on the conditions of entry and residence of third-country nationals in the framework of an intra-corporate transfer).
- d) Use of staff without employment contract ("self-employed persons working for the contractor"), without the tasks of the self-employed persons being particular well-defined parts of the contract.
- e) Use of suppliers and/or transporters by the contractor, in order to perform the contract at the place of performance, unless the economic activities of the suppliers and/or the transporting services are within the subject of this call for tender (see Section 1.4).
- f) Performance of part of the contract by members of an EEIG (European Economic Interest Grouping), when the EEIG is itself a contractor or a group member.

The persons mentioned in points a), b), c) and d) above will be considered as "personnel" of the contractor as defined in the contract.

All contractual tasks may be subcontracted unless the Technical specifications expressly reserve the execution of certain critical tasks to the sole tenderer itself, or in case of a joint tender, to a member of the group.

Changes concerning subcontractors identified in the tender (withdrawal/replacement of a subcontractor, additional subcontracting) during the procurement procedure (after the submission deadline and before contract signature) require the prior written approval of the Contracting authority subject to the following verifications:

- any new subcontractor is not in an exclusion situation;
- the tenderer still fulfils the selection criteria and the new subcontractor fulfils the selection criteria applicable to it individually, if any;
- the terms of the originally submitted tender are not altered substantially, i.e. all the tasks assigned to the former subcontractor are taken over by another involved entity, the change does not make the tender non-compliant with the Tender specifications, and the evaluation of award criteria of the originally submitted tender is not modified.

Subcontracting to subcontractors identified in a tender that was accepted by the Contracting authority and resulted in a signed contract, is considered authorised.

EIGE, as Contracting authority, reserves the right to ask the main contractor to list specifically tasks implemented by the sub-contractors during the implementation of the contract.

Statements of exclusivity and availability

Statements of exclusivity and availability (using the form in Standard Submission Forms and adding under "other documents" tab upon submission of tender) are necessary to provide, one for each indicated expert of the project team, in order to fulfil the following conditions:

- The experts proposed in this tender must not be part of any other tender being submitted for this tender procedure. They must therefore engage themselves exclusively to the tenderer;
- Each expert must also undertake to be available, able and willing to work for all the period foreseen for his/her input during the implementation of the tasks as indicated in the Terms of reference and/or in the Organisation and methodology.

Any expert who is engaged in an EU/EIGE-financed project, where the input from his/her position in that contract could be required on the same dates as his/her activities under this contract must not be proposed as a key expert for this contract under any circumstances. Consequently, the dates included by a key expert in his/her statement of exclusivity and availability in your tender must not overlap with dates on which he/she is committed to work as key expert on any other contract.

The expert may participate in parallel tender procedures but must inform the Contracting Authority of these in the Statement of Exclusivity and Availability. Furthermore, the expert is expected to notify the tenderer immediately if he/she will be successful in another tender procedure and he/she is expected to accept the first engagement which is offered to him/her.

Having selected a consortium partly on the basis of an evaluation of the key experts presented in the tender, the Contracting Authority expects the contract to be executed by these specific experts. However, after the notification of award, the selected tenderer may propose justified replacements for the key experts, but the replacements will be valid only after the written consent of the Contracting Authority.

2.2.2 SECTION TWO: EXCLUSION CRITERIA DOCUMENTATION

The objective of the exclusion criteria is to assess whether the tenderer is in any of the exclusion situations listed in Article 136(1) of the Financial Regulation.

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 the successful tenderer is in one of the situations of exclusion by requiring the supporting documents listed in the declaration of honour.

The successful tenderer 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.

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 tenderer to whom the contract is awarded shall provide, within 10 calendar days following the dispatch of the letter informing him/her of the proposed award of the contract and preceding the signature of the contract, 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.

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:

- The average annual turnover of the tenderer must be minimum EUR 450.000 during the past 2 years.

The most recent year must have been closed within the last 18 months.

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 by 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.

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.

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/EC¹⁶.

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:

- 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 assessing and analysing EU wide databases, presenting and interpreting data from gender equality and intersecting inequalities perspectives;
- Capacity to manage the project with the aim to deliver in-time high-quality final products meeting the scope requirements;
- 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;
- Experience in engaging external experts in peer-review process;
- Very good command of English.

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:

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

Evidence for T1: Reference list (including contact details) of minimum three (3) current and/or past customers to whom the tenderer has supplied the core services, in the past five (5) years; specifying the tenderer's share in provision of the services and if subcontractors were used for any of the services.

The reference list shall clearly indicate the scope and experience (i.e. in a summary table) of the similar services provided.

Criterion T2: The tenderer must prove experience in leading EU and/or international projects, which covered at least 10 EU Member States.

Evidence for T2: At least two (2) EU and/or international projects, covering of at least ten (10) EU Member States, 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.

¹⁶ 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>

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, similar tasks completed and skills required. The form can be downloaded from:

Criterion T4. The tenderer must prove experience in implementing EU and/or international online surveys, which covered at least 5 EU Member States.

Evidence for T4: At least two (2) EU and/or international projects, which involved data collection using online surveys and covered at least five (5) EU Member States, 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 members of the team must be enclosed and must clearly show evidence of the experience, similar tasks completed 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 technical offer should present the following sections:

- a) Methodological approach, including understanding of the project context and rationale
- b) Project management, organisation of the project team, internal communication
 - Detailed presentation of the project management plan

- Detailed presentation of risk management strategy
- c) Quality assurance
 - Quality of deliverables
 - Quality of language

If the tenderer intends to subcontract any part of the services, a description of the extent to which tasks will be sub-contracted, as to how subcontracting will be effectively monitored, must be provided. It will be checked during the contract implementation.

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 80 pages, 12 points font size. 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. **The estimated total amount of all purchases under this contract is EUR 450 000, excluding VAT. Tenders presenting a total price superior to this maximum amount will be excluded.**

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

- The total number of days (person-days) each member of staff will contribute to the project (ref. Financial Offer Form "Professional fees");
- Professional fees should be expressed as the number of person-days multiplied by the unit price per working day for each expert proposed. The unit price should cover expert's fees and administrative expenditures (ref. Financial Offer Form "Professional fees");
- Other costs shall include direct costs such as translation expenses, any expenses for (costs relative to the deliverables). This amount does not cover the Contractor's fees, they should be included in the (ref. Financial Offer Form "Other costs").

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. For this reason, the Contractor may be requested to provide a selection of price quotes for one of all of the above-mentioned services as requested and if applicable. Contractor's attention shall be drawn to the Article II.22 (Reimbursements) of the General Conditions for the 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.

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.

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 2.2.3 Selection criteria.

In case of joint offers or/and subcontracting:

- For the overall 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.

The evaluation will be based on the information and evidence contained in the tenders and, if applicable, on additional information and evidence provided at the request of the Contracting authority during the procedure. If any of the declarations or information provided proves to be false, the Contracting authority may impose administrative sanctions (exclusion or financial penalties) on the entity providing the false declarations/information.

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

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

Criteria number	Quality criteria	Maximum points per criteria	Minimum required score
1	Quality of the proposed methodology, including assessment of project context	70	42
	Sub-criterion 1.1 Methodology for the development of conceptual framework (including the mapping of existing surveys and statistical assessment of selected indicators)	20	12
	Sub-criterion 1.2 Methodology for developing the questionnaire and carrying out stakeholder consultations	15	9
	Sub-criterion 1.3 Methodology for the implementation of EU-wide online panel survey of gender gaps in unpaid care, individual and social activities	35	21
2	Organisation of the work and resources	15	9
	Sub-criterion 2.1 Overall project management approach including a work plan	10	6
	Sub-criterion 2.2 Presentation of the timeline	5	3
3	Quality control measures	15	9
Total		100	

Tenders scored either below the minimum score required per (sub) criterion and/or below 65 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.

Criteria 1. Quality of the proposed methodology, including assessment of project context

The tender will be evaluated on the proposed methodology and is expected to demonstrate a clear understanding of the rationale of this study, good knowledge of EU strategies, policies and legislation linked to the topic of the research at the EU and Member State level and to identify of the most important issues and knowledge gaps.

Sub-criterion 1.1 Methodology for the development of conceptual framework to collect data on gender gaps in unpaid care, individual and social activities (including the mapping of existing surveys and statistical assessment of selected indicators)

Tenderers should present a detailed methodological approach to develop a conceptual framework to collect data on women's and men's engagement in unpaid care, individual and social activities (including the mapping of surveys on time use and unpaid work in the EU and abroad) and explain clearly the reasons for their specific methodological choice and their 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 gender analysis.

The evaluation committee will appreciate and evaluate correspondingly specific proposals and solutions, which according to the tenderer improve the minimum requirements drawn up in the Technical Specifications and give an added value to the study. 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. The evaluation committee will also assess the novelty and soundness of the methodological proposal.

Tenderers are to clearly indicate how the methodological difficulties in the process, if any, will be tackled.

Tenderers should include a list potential data sources.

Sub-criterion 1.2 Methodology for the development of questionnaire and carrying out stakeholder consultations.

Tenderers should present a detailed methodological approach for the development of questionnaire for online panel survey and carrying out stakeholder consultations and explain clearly the reasons for their specific methodological choice and their 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.

The evaluation committee will appreciate and evaluate correspondingly specific proposals and solutions, which according to the tenderer improve the minimum requirements drawn up in the Technical Specifications and give an added value to the study. 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. The evaluation committee will also assess the novelty and soundness of the methodological proposal.

Tenderers are to clearly indicate how the methodological difficulties in the process, if any, will be tackled.

Sub-criterion 1.3 Methodology for the implementation of EU-wide online panel survey of gender gaps in unpaid care, individual and social activities

Tenderers should present a detailed methodological approach to implement an online panel survey to gather requested knowledge from women and men and explain clearly the reasons for their specific methodological choice and their 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 gender analysis.

The evaluation committee will appreciate and evaluate correspondingly specific proposals and solutions, which according to the tenderer improve the minimum requirements drawn up in the Technical Specifications and give an added value to the study. 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. The evaluation committee will also assess the novelty and soundness of the methodological proposal.

Tenderers are to clearly indicate how the methodological difficulties in the process, if any, will be tackled.

Criteria 2. Organisation of the work and resources

Sub-criteria 2.1. Overall project management approach including a work plan

The tenderer is expected to demonstrate a clear understanding of the overall management approach in order to achieve specific objectives and assignments under this contract in a cost-efficient and timely manner.

The tenderer is expected to present a detailed work plan, indicating key stages of the study and distribution of tasks between team members. The work plan should be based on these Technical Specifications and should indicate how the study activities will be managed and implemented.

The tenderer is expected to demonstrate capacities of establishing a framework of regular consultation with EIGE and capacity to address EIGE's comments on activities and deliverables.

The evaluation committee will assess soundness and appropriateness of the project management approach leading to smooth achievement of objectives and deliverables. The evaluation committee will also assess how the professional qualifications and the organization of the project team will ensure the effectiveness and timely implementation of this study. Furthermore, the evaluation committee will assess the effectiveness of the consultation framework with EIGE and the approach proposed for addressing EIGE's comments on activities and deliverables.

Sub-criteria 2.2. Presentation of the timeline

The tenderer must present a timeline of the project activities, presenting a clear and logical structure of planned activities, their duration, deadlines and identification of parallel activities.

The evaluation committee will assess how the timeline is developed to ensure the effectiveness and feasibility of set deadlines, and the timely preparation and delivery of the work plan.

Criteria 3. Quality control measures and project risk management

The tenderer is expected to explain how the quality of the deliverables and the implementation of the activities will be ensured and how external experts' will be engaged in the peer-review process. The tenderer is expected to demonstrate a specific concern for the quality, readability and style of the language used for the deliverables. Tenderer should also present how the high quality results will be assured while working under pressure. The deliverables should be subject to a quality assurance and quality control process. Specific attention must be paid to the quality, readability and style of the language used for the deliverables, ensuring that the content of the information provided is comprehensive, detailed, relevant, gender-sensitive and user-friendly.

The tenderer is expected to justify ability to control project quality and respond to EIGE's ad-hoc requests ensuring high quality of the results. The tenderer is expected to define and follow a process

to verify if the deliverables meet EIGE's requirements and to take the necessary mitigation actions in case the quality control reveals the deliverables do not meet EIGE's standards. The evaluation committee will assess the proposed methodology on quality assurance and the soundness and appropriateness of the proposed methodology for quality control.

The tenderer should present a strategy to ensure the quality and relevance of the results, the timely delivery and the quality control scheme. In their bid, tenderers must justify their quality assurance plan for achieving deadlines and outline contingency measures to mitigate risks. The following aspects should be addressed:

- **Quality assurance:** The tenderer should define and adhere to a process that will ensure that the execution of tasks and activities meet the requirements set by EIGE and will be performed without defects and/or errors in a timely and cost-effective manner.
- **Quality control:** The tenderer should define and follow a process that will ensure that the deliverables meet EIGE's requirements, therefore, the contractor should demonstrate how to integrate EIGE's decisions on each of the deliverables. This process should also outline the mitigating actions to be implemented in case the quality control reveals errors in the deliverables.
- **Risk management strategy:** The tenderer is expected to present the potential risks related to the activities of the project, assess their likelihood and present a well-elaborated mitigation plan. The tenderer should explain which potential risks could endanger the effective and sound implementation of the study and which possible mitigating solutions could be taken to reduce the risks. The tenderer should present a strategy to ensure that all relevant risks in the project implementation are addressed and that risk management strategies are put in place in case of failed delivery. A contingency measure to mitigate the risks working under pressure and a clear and thorough strategy on how to manage risks is expected.

Tenderer should also present how the high quality results will be assured while working under pressure. Specific expertise and adequate resources are expected to be devoted to this important issue.

If the tenderer intends to subcontract any part of the services, a description of the extent to which tasks will be sub-contracted, as to how subcontracting will be effectively monitored, must be provided

B. Financial evaluation

The evaluation of Financial Offers is based on the total price.

The offers exceeding the maximum price set in section 2.2.5 of these Specifications will be excluded.

The cheapest offer will receive the maximum points and the rest of the candidate's offers will be awarded points in relation to the best offer as follows;

$$PP = (PC / PB) \times 100$$

where:

PP = Weighted price points

PC = Cheapest bid price received

PB = Bid price being evaluated

3.3 AWARD OF THE CONTRACT

3.3.1 AWARD PRINCIPLE

The contract will be awarded to the most economically advantageous offer on the basis of the ratio between the quality criteria (60%) and the price (40%). The following formula will be used:

$$TWP = (QP \times 0.6) + (PP \times 0.4)$$

where:

TWP = Total weighted points score

QP = Qualitative points

PP = Weighted price points

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 quality.

Should the outcome of the formula lead to two or more tenders with the same result, the tenderer who has been awarded the highest marks for quality will be deemed to be the most economically advantageous tender. This approach will continue to be applied to each of the award criteria in the descending order listed in below until a most economically advantageous tender can be determined:

1. Quality of the proposed methodology, including assessment of project context
2. Organisation of the work and resources
3. Quality control measures

3.3.2 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.

3.3.3 STANDSTILL PERIOD

EIGE shall not sign the contract with the successful tenderer 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 fails, the notification will be re-sent immediately by letter, in which case the standstill period of 15 calendar days will apply.

3.3.4 EVIDENCE BY CONTRACTOR

The contracting authority may ask tenderers at any moment during the procedure to submit an updated declaration or all or part of the supporting documents on selection criteria, defined in section 2.2.3 where this is necessary to ensure the proper conduct of the procedure.

If this evidence is not provided or proved to be unsatisfactory, the Institute reserves the right to cancel the award procedure.

3.3.5 NO OBLIGATION TO AWARD THE CONTRACT

The tendering procedure shall not involve EIGE in any obligation to award the contract. 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 CONTRACT

4.1 NATURE OF THE CONTRACT

Service Contract.

4.2 PLACE 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 online.

4.3 VOLUME AND DURATION OF THE CONTRACT

The maximum amount available for the contract is EUR 450 000, excluding VAT, for the whole duration of performance of the tasks of 13 months.

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.⁴³

By virtue of Article 164(4) and 164 (5) of the Financial Regulation, EIGE reserves the option to launch a negotiated procurement procedure with the contractor chosen as a result of the present call for tenders for new services consisting in the repetition of similar services.

4.4 TERMS OF PAYMENT

Payments shall be made in accordance with Article I.5 of the Draft Service 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 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.

4.5 GUARANTEES

No guarantees are required by the Contract.

4.6 DATA PROTECTION

See Section II.g in the Draft Service Contract and the Invitation to Tender.