



EIGE/2019/OPER/10

TENDER SPECIFICATIONS

Gender inequalities in unpaid care work and on the labour market in the EU Review of the implementation of Area F: Women and the Economy of the Beijing Platform for Action

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.

CONTENTS:

1	TECHNICAL SPECIFICATIONS	3
1.1	GENERAL BACKGROUND	3
1.2	SCOPE OF THE PROCEDURE	4
1.3	OVERALL AND SPECIFIC OBJECTIVES	4
1.4	EXPECTED RESULTS	5
1.5	DETAILS ON DELIVERABLES. PROGRESS REPORTS.....	7
1.6	INPUT BY THE CONTRACTING AUTHORITY	11
1.7	GENERAL GUIDANCE ON METHODOLOGY	11
1.8	PROJECT TEAM	11
1.9	PERFORMANCE AND QUALITY REQUIREMENTS	15
1.10	GENERAL DELIVERY TIME.....	16
1.11	PAYMENTS AND IMPLEMENTATION PROGRESS	17
1.12	INTELLECTUAL PROPERTY RIGHTS	17
1.13	PARTS OF THE RESULTS OF PRE-EXISTING RIGHTS	17
1.14	PLAGIARISM IN THE TENDER	17
1.15	RULES CONCERNING DISCLOSURE IN THE PUBLIC INTEREST	18
1.16	COMPLIANCE WITH LAW OBLIGATIONS	18
1.17	USE OF DATA	18
2	THE TENDER	19
2.1	SUBMISSION OF TENDERS	19
2.2	CONTENT OF THE TENDER	20
2.2.1	SECTION ONE: ADMINISTRATIVE INFORMATION.....	20
2.2.2	SECTION TWO: EXCLUSION CRITERIA DOCUMENTATION	23
2.2.3	SECTION THREE: SELECTION CRITERIA DOCUMENTATION.....	24
2.2.4	SECTION FOUR: TECHNICAL OFFER	27
2.2.5	SECTION FIVE: FINANCIAL OFFER	28
3	THE ASSESSMENT PROCEDURE	29
3.1	EVALUATION OF TENDERERS	29
3.2	EVALUATION OF TENDERS	29
3.3	AWARD OF THE CONTRACT	33
3.3.1	AWARD PRINCIPLE	33
3.3.2	INFORMATION TO TENDERERS	34
3.3.3	STANDSTILL PERIOD	34
3.3.4	EVIDENCE BY CONTRACTOR	34
3.3.5	NO OBLIGATION TO AWARD THE CONTRACT	34
4	THE CONTRACT	35
4.1	NATURE OF THE CONTRACT	35
4.2	PLACE OF PERFORMANCE	35
4.3	VOLUME AND DURATION OF THE CONTRACT	35
4.4	TERMS OF PAYMENT	35
4.5	GUARANTEES	35
4.6	DATA PROTECTION	35

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 working programme defined in the Single Programming Document 2019-2021.

EIGE strives to promote gender equality in all aspects of society across the EU and beyond. Since its foundation, EIGE has 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.

EU commitment to the Beijing Platform for Action

The 4th World Conference on Women, held in Beijing in 1995, officially adopted the *Beijing Declaration and Platform for Action for Equality, Development and Peace* (BPfA).³ The BPfA outlines the strategic objectives and actions to be taken by the international community, national governments and civil society for the promotion and protection of human rights for women and the girl child as inalienable, integral and indivisible elements of universal human rights⁴. Its objectives and actions are arranged throughout twelve critical areas of concern.

All 28 EU Member States have signed the document and thus have recognised their responsibility to take actions to implement the BPfA. While national governments have the primary responsibility for the advancement of women, the European Union was involved in the formulation of the Beijing Declaration and has committed itself to promoting the BPfA objectives. In December 1995, the European Council acknowledged the European Union's commitment to the BPfA and expressed its intent to review BPfA implementation across the Member States on a yearly basis. Since 1999, quantitative and qualitative indicators have been developed by successive presidencies of the Council for the purposes of monitoring progress towards achieving the BPfA goals.

EIGE's support to the Presidencies of the Council of the EU

Within the scope of its mandate, since 2011 EIGE has provided technical support to the rotating Presidency of the Council of the European Union as part of the ongoing follow-up of the implementation of the BPfA in the EU. Forthcoming Council Presidencies take up selected issues within the critical areas of concern identified in the BPfA.

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 Beijing Declaration and Platform for Action <http://www.un.org/womenwatch/daw/beijing/platform/>

⁴ Beijing Declaration and Platform for Action, Mission Statement
<http://www.un.org/womenwatch/daw/beijing/platform/plat1.htm#statement>

In this context, EIGE reviews existing indicators previously adopted by the Council; proposes new indicators when relevant; and develops benchmarking information in the selected critical areas of concern. The overall activity aims at:

- analysing and reviewing the area of concern selected by the upcoming EU Presidency;
- providing advice on updating and improving existing indicators or proposing new ones;
- developing a report on the progress made in the implementation of the BPfA in the selected area;
- promoting and dissemination of information.

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 regarding the study on area F of the BPfA – Women and the Economy. The study will serve as a basis for EIGE's report to the German Presidency of the Council of the EU in the second semester of 2020.

1.2 SCOPE OF THE PROCEDURE

The main objective of this procedure is to select the best proposal for the study that will serve as a basis for EIGE's report to the German Presidency of the Council of the EU in the second semester of 2020.

The study to be carried out under this contract shall focus on the implementation of three strategic objectives of the BPfA in area F 'Women and the Economy' namely "F1 relating to women's economic rights and independence, F5 addressing occupational segregation and F6 relating to work-life balance.

The study shall be based on mixed-methods research, adopt an intersectional analysis and shall explore gender inequalities in unpaid care work and on the labour market in the EU. In particular, the research shall assess:

- how gender inequalities in unpaid care activities link with gender inequalities in pay/earnings;
- the national conditions leading to and enabling care work being externalized/outsourced and describe how paid care work is provided and compensated and whether it constitutes decent work;
- different arrangements in paid work and care work in partnership relations in private households (predominating in different countries); and
- the trends in the progress towards equal sharing of unpaid care activities in partnerships ("earner-carer-model").

1.3 OVERALL AND SPECIFIC OBJECTIVES

OVERALL OBJECTIVE

The overall objective of the study aims at deepening the understanding of the links between unequal sharing of caring between women and men in families and broader gender inequalities in the labour market.

SPECIFIC OBJECTIVE(S)

The specific objectives are:

Objective 1. Increased understanding of linkages between pay inequalities on the labour market and unpaid care in the EU Member States.

Objective 2. Increased understanding of the policy and individual factors influencing household's decisions to externalize care work.

Objective 3. Increased understanding of the trends in progress towards equal sharing of care activities within households in the EU.

1.4 EXPECTED RESULTS

RESULT N. 1

Increased understanding of linkages between pay inequalities on the labour market and unequal sharing of unpaid care in the EU Member States.

Deliverable D1.1: Research report on the linkages between pay inequalities on the labour market and inequalities in care activities in the EU Member States.

No	Activities (D1.1)
1.1.1	To review academic literature on the linkages between pay inequalities on the labour market and inequalities in care activities in the EU Member States.
1.1.2	To analyse the statistical linkages between pay inequalities on the labour market and inequalities in care activities in the EU Member States.
1.1.3	To prepare the research report on the linkages between pay inequalities on the labour market and inequalities in care activities in the EU Member States including policy recommendations.

This research report will combine a review of the literature and statistical analysis and will explore the different linkages between levels of gender inequalities in pay (measured through gender pay gap, gender gap in overall earning and others relevant indicators) and the distribution of unpaid care work by type between women and men in general and between specific groups of women and men. Three types of care work will be examined more closely: 1) caring for and/or educating children, 2) cooking and household chores and 3) caring for older people and relatives with disabilities. To establish the linkages, the analysis will build on existing methodologies to derive gender pay gap and related measures⁵ as well as gender specific care activities (by type) or other measures of gender inequalities in care. Where conceptually and statistically relevant, complementary and/or alternative measures will be reviewed.

This report will also highlight the size of the paid care sector across the countries, how much it is gender segregated (horizontally and vertically) and the average wage distribution in this sector compared to average wage distribution in the entire economy. The report will also include policy recommendations to minimise gender inequalities in pay on the labour market.

The contractor will have to apply for microdata of major EU surveys at the beginning of this contract and work with it throughout the later stages of the project. It is necessary that the contractor demonstrates its ability to apply for and receive such microdata. For example, following Eurostat procedures, the contractor needs to be recognized as a research entity by Eurostat.

⁵ EIGE. (2019). Tackling the gender pay gap: not without a better work-life balance.

Timelines: EIGE shall have two (2) weeks from the date of receipt of deliverable(s) to approve or reject in full or in part D1.1. 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): 30 pages

RESULT N. 2

Increased understanding of prevalence and policy and individual factors behind externalization of care work in the EU.

Deliverable D.2.1: Research report on the prevalence, effects as well as policy and individual factors relating to externalization of care work in the EU Member States.

No	Activities (D2.1)
2.1.1	To review academic literature on the prevalence, effects and policy and individual factors relating to the externalization of care work in the EU Member States.
2.1.2	To analyse statistical evidence on the prevalence, effects and policy and individual factors relating to the externalization of care work in the EU Member States.
2.1.3	To assess the policy context relating to the externalization of care work at EU and Member States' level and highlight promising examples of national policies.
2.1.4	To develop guidelines for focus group discussions on the effects and policy and individual factors relating to the externalization of care work in 10 EU Member States (DE, RO, FR, DK, FI, SK, NL, PT, EE, IE).
2.1.5	To carry-out a pilot focus group discussion on the effects and policy and individual factors relating to the externalization of care work (in Croatia).
2.1.6	To carry-out focus group discussions on the effects and policy and individual factors relating to the externalization of care work in 10 EU Member States (DE, RO, FR, DK, FI, SK, NL, PT, EE, IE).
2.1.7	To prepare the research report on the prevalence, effects as well as policy and individual factors relating to externalization of care work in the EU Member States including policy recommendations.

This deliverable will shed light on the prevalence of externalisation of care work by households in the EU and analyse the opportunities and constraints associated with externalization of care work in terms of gender roles in the household, labour market and career opportunities, including economic independence. It will further describe the conditions in which paid care work is delivered, regulated and compensated with a particular emphasis on working conditions and overall job quality associated with paid care work. The research will adopt a mixed-method approach and combine literature review, policy review, statistical analysis covering EU MS and qualitative information relating to 10 EU MS.

Qualitative data will be collected through focus group discussions with participants from diverse family circumstances and care needs. The number of participants for focus group discussions should not exceed 8. The guidelines for focus group discussions will be tested during a pilot held in Croatia. The focus groups discussions will be held in the following selected EU MS: DE, RO, FR, DK, FI, SK, NL, PT, EE, IE. The research report will include policy recommendations.

Timelines: EIGE shall have two (2) weeks from the date of receipt of deliverable(s) to approve or reject in full or in part D2.1. 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 of the deliverable(s).

Size of the deliverable(s): 30 pages

RESULT N. 3

Increased understanding of the trends in progress towards equal sharing of care activities within households in the EU.

Deliverable D.3.1: Research report on the trends in progress towards equal sharing of care activities within households in the EU Member States

No	Activities (D3.1)
3.1.1	To review academic literature on the trends in progress towards equal sharing of care activities within households in the EU Member States.
3.1.2	To analyse statistical evidence on the trends in progress towards equal sharing of care activities within households in the EU Member States.
3.1.3	To assess the policy context relating to progress towards equal sharing of care activities within household in the EU Member States and highlight promising examples of national policies.
3.1.4	To prepare a discussion paper for discussion during experts' meeting.
3.1.5	To prepare the research report on the trends in progress towards equal sharing of care activities within households in the EU Member States including policy recommendations.

This report will describe progress observed in the last decade towards equal sharing of care responsibilities between women and men. It will highlight public incentives or obstacles for the partnership-based division of unpaid care work between the sexes, including leave policies, flexible working arrangements and taxation system when relevant. In addition, the report will shed light on the individual and household level behaviour as influenced by relevant gender norms and potential space of behavioural change, not the least due to institutional initiatives.

To ensure the high quality and political relevance of the recommendations, EIGE will organise Experts' meeting in spring 2020. Activity 3.1.4 will provide a discussion paper, including questions for discussion in the meeting. The discussion paper will briefly summarize the main findings of the research, which will serve as a solid evidence for proposed recommendations. The discussion questions will be tailored towards the different profiles of stakeholders and provide solid basis for discussions from various perspectives. The contractor will have to present a draft discussion paper to EIGE for its approval two weeks before the meeting takes place. All the other practicalities related to the organisation of the experts' meeting will be arranged by EIGE.

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. 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 of the deliverable(s).

Size of the deliverable(s): 30 pages

1.5 DETAILS ON DELIVERABLES. PROGRESS REPORTS

All the deliverables listed must be submitted in an excellent standard of English (UK). The editorial rules and standards can be referenced in the Interinstitutional Style Guide for EU institutions:

<http://publications.europa.eu/code/en/en-000500.htm>

The reports must be written in a clear and simple way, providing information and analyses that can be understood by non-specialists. They must be in Word or Excel format. The format of the annexes may vary depending on the type of information presented.

For the preparation of the deliverables, EIGE's guidelines on abbreviations, country order, referencing, text layout, editing, and etc., must be adhered to. These guidelines will be provided to the contractor at the Inception meeting.

The final versions of all deliverables must be professionally proofread⁶, preferably by a professional with the level of a native English speaker. The documents must be delivered in an appropriate layout and they shall contain visual elements (e.g. tables and graphs). If graphs/infographic elements are used, they should be provided in editable formats, for example: Word, Excel, Adobe Illustrator, InDesign.

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

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

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.

Progress reports

Inception report

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

In the inception meeting (A1), the Contractor will present in detail the methodology for information and 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.

⁶ Proofreading. Specifically these tasks include:

- Proofreading texts (including all footnotes and/or endnotes, captions under photographs, lists, etc.) and ensuring excellent English language, vocabulary, syntax, expression, grammar and relevant terminology
- Ensuring that no typographical errors are left in final texts
- Proofreading texts and verifying compliance with the house-style and the EU Inter-institutional Style Guide (published on the homepage of the Publications Office: http://www.publications.europa.eu/index_en.htm), and overall consistency with other texts in terms of format, structure and style
- Resolving queries with the authors
- Giving feedback on templates, guidelines and workflow procedures

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

- the main findings of the preparatory work undertaken;
- a proposal of the methodological approach to be used and the problems encountered;
- data to be collected from different sources, covering all EU Member States;
- a provisional structure for the Interim report and Final report;
- information on the team members and their contact details, including the list of 11 national researchers;
- an updated work-plan ensuring the submission of the deliverables within the contractual deadline.

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) days of the inception meeting (A1). The Inception report (A2) will present the results of the initial analysis, the agreed methodology to be used for further research, the organisation of work, the planning and timeline for all activities of the project within the contractual deadline and information on the project staff members and their contact details.

Timelines:

The Contractor should prepare an Inception report (A2) summarising the elements above and submit it to EIGE no more than five (5) days after the inception meeting. EIGE will have five (5) working days from receipt to approve or comment on the report. Within five (5) 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 10 pages without annexes, in English, electronic version.

Interim report

Within twelve (12) weeks after signing of the contract the Contractor will provide the Interim report (A3) to EIGE and participate in the interim meeting (A4) in Vilnius. The Project Manager and at least one of the senior researchers shall participate in the meeting (A4). In the Interim meeting (A4), the Contractor will present the preliminary findings and conclusions of the study, 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:

- a description of the methodologies used;
- final research report on the linkages between pay inequalities on the labour market and inequalities in care activities in the EU Member States (Deliverable D1.1);
- methodological proposal and preliminary results of the quantitative and qualitative analysis of prevalence, effects as well as policy and individual factors relating to externalization of care work in the EU Member States (Deliverable D2.1);

- methodological proposal and preliminary results of the quantitative and qualitative analysis of trends in progress towards equal sharing of care activities within households in the EU Member States (Deliverable D3.1);
- an updated work plan that would ensure the submission of further deliverables within the contractual deadlines.

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

Timelines:

The Interim report (A3) shall be submitted to EIGE by week 12 - a week before the Interim meeting (A4). The contractor shall prepare meeting minutes (A5) and submit them to EIGE no more than five (5) days after the 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 60 pages without annexes, in English, electronic version.

Final report

Within twenty-six (26) weeks after signing of the contract, the Contractor will provide the Final report (A6) to EIGE. The final detailed analytical report will be based on Deliverables D2.1 and D3.1.

The Final Report (A6) shall include the following, but not limited to:

- Executive summary;
- Linkages between pay inequalities on the labour market and inequalities in care activities in the EU Member States. (Deliverable D1.1);
- Prevalence, effects as well as policy and individual factors relating to externalization of care work in the EU Member States (Deliverable D2.1);
- Trends in progress towards equal sharing of care activities within households in the EU Member States (Deliverable D3.1);
- Policy recommendations;
- Conclusions;
- Annexes.

In a separate file, all data used for calculations, analysis and visualisations must be presented. The document shall be compatible with MS Excel.

Timelines:

The Final Report (A6) should be prepared within twenty-six (26) weeks after the signature of the contract. EIGE will have two (2) weeks from the receipt of the report to approve or comment on it. The Contractor will have two (2) weeks from the receipt of EIGE's feedback to address the comments and present the final version.

Size of the deliverable(s): Maximum 60 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 (3)
- Statistician (1)
- National Researchers (11)
- Peer-Reviewers (3)

Project manager (1)

Envisaged tasks (non-exhaustive list)	<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; - 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;
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	<ul style="list-style-type: none"> - Provide EIGE with frequent updates on the progress of implementation; - Perform risk assessment and risk mitigation during the entire period of the contract; - Participate in all meetings with EIGE and in the experts' meeting related to the project. - Coordinate the engagement of external experts in peer review process; - Sign all the deliverables.
Qualifications and professional experience must include	<ul style="list-style-type: none"> - University degree; - Minimum of five (5) years of professional experience in project management; - Proven experience in research management, as manager or coordinator of at least three (3) major international or European projects (preferably research), each involving at least three countries; - Proven experience in the area of gender equality; - Proven experience of analysis, assessment and evaluation of broad range of deliverables; - Excellent knowledge of English (Level C1 based on the Common European Framework of Reference for Languages).
Estimated working time for the profile	<u>1 person x 30 working days</u>

Tenderers should demonstrate that the team of senior researchers profile collectively covers the three main topics of the study, namely economy, sociology, gender studies as well as quantitative and qualitative research skills.

Senior researchers (3)

Statement of exclusivity, availability and conflict of interest

The researcher shall sign a declaration of exclusivity, availability and conflict of interest (see Standard Submission Forms) declaring that they will only join this technical offer and project (ref. Section 2.2. 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)	<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 methodological approach for all research related activities; - Review academic literature on 1) the linkages between pay inequalities and inequalities in care activities in the EU Member States; 2) prevalence, effects and policy and individual factors relating to the externalization of care work in the EU Member States; 3) trends in progress towards equal sharing of care activities within households in the EU Member States and highlight promising examples of national policies.
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	<ul style="list-style-type: none"> - Analyse the statistical linkages between pay inequalities and inequalities in care activities in the EU Member States; - Analyse statistical evidence on the prevalence, effects and policy and individual factors relating to the externalization of care work on EU and Member States level. - Develop guidelines for focus group discussions; - Oversee a pilot focus group discussion on the process of externalization of care work and of focus groups in 10 Member States in coordination with National Researchers; - Analyse qualitative data from focus group discussions; - Analyse statistical evidence on the trends in progress towards equal sharing of care activities within households on the EU and Member States level. - Assess the policy context relating to progress towards equal sharing of care activities within household in EU MS including highlighting promising national examples. - Draft research reports; - Develop policy recommendations; - Ensure the reliability, accuracy and policy relevance of the information collected; - Integrate EIGE's ad-hoc comments on activities and deliverables in a clear and timely manner; - Integrate the comments and proposals of external peer-reviewers; - Ensure the quality and sign all the deliverables; - Participate in meetings with EIGE or other events related to the project.
Qualifications and professional experience must include	<ul style="list-style-type: none"> - University degree in social sciences, preferably Master or PhD level, mainly in the research areas of the study (economy, sociology, econometrics, gender studies), where expertise and knowledge will be applied; - Minimum of five (5) years of experience in research (following the graduation of Master's degree) in one of the in the research areas of the study (economy, sociology, econometrics, gender studies). - Demonstrated experience with some of the envisaged tasks, such as qualitative data analysis; development of methodology for focus groups discussions; quantitative (econometrics based) data analysis, with in particular experience in handling labour market and pay related data; cross-sectional and multi-country micro-datasets. - At least three (3) publications (including articles or published reports of research projects) on pay inequalities, care work and/or unpaid care having a gender equality dimension included. Alternatively, at least 5 publications (including articles or published reports of research projects) relating to areas of expertise across the envisaged tasks and demonstrating capacity to draft reports containing multi-country analysis. - Proven experience in supervising or collaborating in at least three (3) international or European research projects, each involving at least three countries;

	- Excellent knowledge of English (Level C1 based on the Common European Framework of Reference for Languages).
Estimated working time for the profile	<u>3 persons x 50 working days</u>

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.

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 they will only join this technical offer and project (ref. Section 2.2. 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)	<ul style="list-style-type: none"> - Develop methodology for statistical analysis; - Explore available survey and administrative data sources relevant for the analysis of the current study; - Assess major data gaps from gender equality perspective and propose recommendations on how they could be closed; - Analyse data (including microdata) and conduct policy relevant interpretative and comparative analysis; - Ensure that data is analysed and presented following the highest quality standards of the European statistical system.
Qualifications and professional experience must include	<ul style="list-style-type: none"> - University degree in statistics, mathematics or social sciences (with a significant quantitative component); - Minimum of five (5) years of experience in data analysis in social statistics, preferably linked with gender equality issues; - Experience in work with microdata and use of statistical software; - Excellent knowledge of English (Level C1 based on the Common European Framework of Reference for Languages).
Estimated working time for the profile	<u>1 person x 60 working days</u>

National Researchers (11)

Envisaged tasks (non-exhaustive list)	<ul style="list-style-type: none"> - Develop guidelines for focus group discussions in coordination with Researchers; - Oversee a pilot focus group discussion on the process of externalization of care work and of focus groups in 10 MS in coordination with Researchers; - Analyse qualitative data from focus group discussions; - Support the drafting of research reports.
Qualifications and professional experience must include	<ul style="list-style-type: none"> - University degree in social sciences or gender equality; - Minimum of three (3) years of proven experience in research on gender equality;

	<ul style="list-style-type: none"> - At least two (2) publications (including articles or reports of research projects) on gender equality; - Excellent knowledge of English (Level C1 based on the Common European Framework of Reference for Languages).
Estimated working time for the profile	<u>11 persons x 10-13 working days</u>

Peer-Reviewers (3)

Envisaged tasks (non-exhaustive list)	<ul style="list-style-type: none"> - Provide expert feedback on the methodology, findings and data included in the research report - Validate conclusions
Qualifications and professional experience must include	<ul style="list-style-type: none"> - University degree in social sciences, preferably Master or PhD level, mainly in the research areas of the study (economy, sociology, econometrics, gender studies), where expertise and knowledge will be applied; - Minimum of five (5) years of experience in research (following the graduation of Master's degree) in one of the in the research areas of the study (economy, sociology, econometrics, gender studies). - Demonstrated experience with some of the envisaged tasks, such as qualitative data analysis; development of methodology for focus groups discussions; quantitative (econometrics based) data analysis, with in particular experience in handling labour market and pay related data; cross-sectional and multi-country micro-datasets. - At least three (3) publications (including articles or published reports of research projects) on pay inequalities, care work and/or unpaid care having a gender equality dimension included. Alternatively, at least 5 publications (including articles or published reports of research projects) relating to areas of expertise across the envisaged tasks and demonstrating capacity to draft reports containing multi-country analysis. - Proven experience in supervising or collaborating in at least three (3) international or European research projects, each involving at least three countries; - Excellent knowledge of English (Level C1 based on the Common European Framework of Reference for Languages).
Estimated working time for the profile	<u>3 persons x 12 working days</u>

1.9 PERFORMANCE AND QUALITY REQUIREMENTS

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

EIGE will monitor the project in technical and administrative terms. The contractor should report immediately in writing to the Institute any problems encountered during 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. Consistency with the EU conceptual framework on the gender pay gap and equal sharing of unpaid care;
5. 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
D1.1	Research report on the linkages between pay inequalities on the labour market and inequalities in care activities in the EU Member States.	9 week
D2.1	Research report on the prevalence, effects as well as policy and individual factors relating to externalization of care work in the EU Member States.	18 week
D3.1	Research report on the trends in progress towards equal sharing of care activities within households in the EU Member States	26 week

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

	Progress report	Deadline
A1	Inception meeting	W2
A2	Inception report	W2+5 working days
A3	Interim report	W12
A4	Interim meeting	W13
A5	Minutes of the Interim meeting	W13+5 working days
A6	Final report	W26

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 (ie. emails, ...)

1.11 PAYMENTS AND IMPLEMENTATION PROGRESS

The contractor (or leader in the case of a joint tender) may claim 2 interim payments in accordance with Article I.5 of the draft Service Contract.

First interim payment equal to 40% and a second interim payment equal to 30% of the price referred to in Article I.4.1 in accordance with Article II.21.6 of the draft Service Contract.

The deliverables to be approved by EIGE for the first interim payment: D1.1 and inception report (A2)

The deliverables to be approved by EIGE for the second interim payment: D2.1 and interim report (A3).

The final payment, equal to 30%, will be made after submission by the contractor and approval of EIGE of the remaining expected deliverable: D3.1 and final report A6. The contractor (or leader in the case of a joint tender) may claim the payment of the balance in accordance with the price and payment conditions referred to in Article I.5, Article I.4.1 in accordance with Article II.21.6 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. 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 each deliverable in accordance with Article II.16.

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 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.

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 non-compliant with the procurement documents, and who make a request in writing will be notified of the name of the tenderer to whom the contract is awarded, the characteristics and relative advantages of the successful tender and the price of the offer and/or contract value. The Contracting authority may decide to withhold certain information that it assesses as being confidential, in particular where its release would prejudice the legitimate commercial interests of economic operators or might distort fair competition between them. Such

information may include, without being limited to, confidential aspects of tenders such as unit prices included in the financial offer, technical or trade secrets.

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

2 THE TENDER

2.1 SUBMISSION OF 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.

Please be aware that after the UK's withdrawal from the EU, the rules of access to EU procurement procedures of economic operators established in third countries will apply to candidates or tenderers from the UK depending on the outcome of the negotiations. In case such access is not provided by legal provisions in force candidates or tenderers from the UK could be rejected from the procurement procedure.

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 hand-written).

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 sub-contracted.

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

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

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

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

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.

Note that non-key experts must not be asked to sign statements of exclusivity and availability.

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

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 before signature of the contract 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. The documents mentioned as supporting evidence in the Declaration on Honour need to be provided whenever requested and where this is necessary to ensure the proper conduct of the procedure within a deadline given by the Contracting authority.

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.

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 400 000 during the past 3 years.

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

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

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

- The tenderer which according to the law of the country in which it is established is required to publish the 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.

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 knowledge of EU strategies, policies and legislation linked to the topic of the research at EU and Member State level;
- good understanding of the different socio-economic realities, stages of development, and culture and traditions as regards gender equality in the EU Member States and their regions;
- experience in accessing and working with EU wide databases on gender equality related topics;
- 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 complement information from national researchers with information from other sources;
- 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 and statistical analysis in the field of gender equality as well as drafting reports and recommendations.

Evidence for T1:

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

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

Evidence for T2:

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

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

Evidence for T3:

Reference list (including contact details) of minimum three current and past customers to whom the tenderer has supplied the core services, in the past 3 years; specifying the tenderer's share (at least

50%) in provision of the services and if subcontractors were used for any of the services. The same reference list (as for Evidence T1) may be used.

The Curricula Vitae (CVs), preferably in a common European format, of the proposed members of the team must be enclosed and must clearly show evidence of the experience and skills required. The form can be downloaded from: <https://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>

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

2.2.4 SECTION FOUR: TECHNICAL OFFER

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

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

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

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

The technical offer should present the following sections:

- a) Methodological approach
- 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.

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. 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 290 000, 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 travel costs, 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.

3.2 EVALUATION OF TENDERS

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	60	35
	Sub-criterion 1.1 Methodology for the analysis of linkages between pay inequalities on the labour market and inequalities in care activities in the EU Member States	20	12

	Sub-criterion 1.2 Methodology for quantitative and qualitative research on the prevalence, effects as well as policy and individual factors relating to externalization of care work in the EU Member States	25	15
	Sub-criterion 1.3 Methodology for the analysis of trends in progress towards equal sharing of care activities within households in the EU Member States	15	8
2	Organisation of the work and resources	20	12
	Sub-criterion 2.1 Overall project management approach including a work plan	5	3
	Sub-criterion 2.2 Organisation of the work of the project team	10	6
	Sub-criterion 2.3 Presentation of the timeline	5	3
3	Quality control measures and project risk management	20	12

Tenders scored either below the minimum score required per (sub) criterion and/or below 60 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

Tenderers should present the conceptual and strategic approach of the study: understanding of the policy context, identification of the most important issues, proposals for the use of the research in a strategic way, innovation in the conceptual base, identification of critical elements of the study and expression of limitations.

Sub-criteria 1.1. Methodology for the analysis of linkages between pay inequalities on the labour market and inequalities in care activities in the EU Member States

Tenderers should present a detailed methodological approach to the analysis of linkages between pay inequalities on the labour market and gender inequalities in care activities, 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 also assess the novelty and soundness of the methodological proposal for the analysis on the linkages between inequalities in pay and inequalities in care activities both unpaid within the home and as paid work in the care sector.

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.

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

Sub-criteria 1.2. Methodological approach for quantitative and qualitative research on the prevalence, effects as well as policy and individual factors relating to externalization of care work in the EU Member States

Tenderers should present a detailed methodological approach to the analysis of the opportunities and constraints associated with externalization of care work in terms of gender roles in the household, labour market and career opportunities, including economic independence.

The tender shall justify their proposed methodologies of the field work, including how they will address concerns for ethics and data protection all through the research process and in each country.

The evaluation committee will also consider the capacity of the tenderer to identify the scope and rationale of the important items and key issues important for the study, the strategic thinking conducive to developing knowledge that can make a difference as regards the implementation of the gender equality perspective across different areas of the EU policy.

Sub-criteria 1.3. Methodological approach for reviewing trends in progress towards equal sharing of care activities within households in the EU Member States

Tenderers should present a detailed methodological approach to analysing trends in progress towards equal sharing of care responsibilities between women and men including examples of policy incentives and obstacles. Tenderers should include potential data sources and approach to developing policy recommendations.

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 must present a clear, logical structure of planned activities and a precise presentation of each, expected milestones and deadlines, responsible persons and clear identification of parallel activities. The tenderer is also 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 must describe how the coverage of all EU Member States will be ensured in policy and statistical analysis.

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 methodological approach demonstrating understanding of the overall management leading to smooth achievement of objectives and deliverables. Furthermore, the evaluation committee will assess the effectiveness of the consultation framework with EIGE and the methodology proposed for addressing EIGE's comments on activities and deliverables.

Sub-criteria 2.2. Organisation of work of the project team

The tenderer is expected to present in its offer:

- the distribution of roles and tasks within the team, by specifying clearly the amount of time each team member will devote to the study in each phase of the project;
- clear responsibilities and actions of the manager ensuring overall management implementation;
- a guarantee of the stability of the core research team proposed for the study;
- the ability to establish effective cooperation with the national researchers.

The tenderer's technical proposal should indicate clearly how the internal communication within the team and interaction with EIGE will be organised.

The evaluation committee will assess how the professional qualifications and the organization of the project team will ensure the effectiveness and timely implementation of this study.

Sub-criteria 2.3. 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. A special focus should be given to the engagement strategy of external experts' in peer-review process of all deliverables covering 12 critical areas of concern. 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 contractor 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 contractor 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.

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.

The tenderer should present a clear and appropriate strategy how to manage EIGE's (ad-hoc) comments and requests for changes and how to integrate EIGEs decisions which are to be considered final. A strategy needs to be developed on how to adequately and strategically deal with the conflicting requirements of any other risks envisaged.

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.

The evaluation committee will assess proposed strategies on how to manage and mitigate risks and effectiveness of contingency measures.

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.

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 tenderer to whom the contract is to be awarded shall provide, within 10 calendar days following the receipt of the letter informing him of the proposed award of the contract and preceding the signature of the contract, the evidence on exclusion criteria, defined in section 2.2.2.

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 or to change the award decision to the benefit of the next best ranked tenderers on condition that s/he provides the evidence on exclusion and selection.

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 on EIGE premises in Vilnius.

4.3 VOLUME AND DURATION OF THE CONTRACT

The maximum amount available for the contract is EUR 290 000, excluding VAT, for the whole duration of performance of the tasks of 7 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.

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.