EIGE
European Institute
for Gender Equality

EIGE/2011/OPER/31

TENDER SPECIFICATIONS

Development of a Statistical Information System for the Gender Equality Index

The purpose of these Specifications is to give instructions and guidance to candidates about the nature of the Offer they will need to submit and to serve as the Contractor's mandate during project implementation. The Specifications ensure that the project will be properly conceived by the Contractor, that the work is carried out on schedule and that resources will not be wasted.

The Technical Specifications will become part of the contract that may be awarded as a result of this tender.

CONTENTS:

1 TECHNICAL SPECIFICATIONS

1.1 GENERAL BACKGROUND

The European Institute for Gender Equality (EIGE) was created by Regulation (EC) No 1922/2006 of the European Parliament and of the Council of 20 December 2006. The overall objectives or long-term effects of EIGE's work are defined in the Regulation as:

..."To contribute to and strengthen the promotion of gender equality including gender mainstreaming in all Community policies and the resulting national policies, and the fight against discrimination based on sex, and to raise EU citizens' awareness of gender equality."

The main tasks of the Institute are the dissemination of the collected and analysed comparable data on gender issues and the facilitation of the exchange of best practices and dialogue among stakeholders in order to raise awareness among EU citizens.

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 specialist on statistical services, particularly addressing gender equality issues and with experience on the development of appropriate software.

1.2 LEGAL BACKGROUND

Equality between women and men is a fundamental value of the European Union, enshrined in its Treaties[1] and in the Charter of Fundamental Rights of the European Union. Mainstreaming the principle of equality between women and men in all its activities represents a general aim for the EU.

The European Institute for Gender Equality (hereafter referred to as "EIGE")[2] is a regulatory agency of the European Union which has been given objectives to contribute to and strengthen the promotion of gender equality, including gender mainstreaming in all Community policies and the resulting national policies, and the fight against discrimination based on sex, and to raise EU citizens' awareness of gender equality by providing technical assistance to the Community institutions, in particular the Commission, and the authorities of the Member States[3].

To meet these objectives, the Institute shall collect, analyse and disseminate relevant objective, comparable and reliable information and data on equality between women and men at the European Union level and shall: "develop methods to improve the objectivity, comparability and reliability of data at European level by establishing criteria that will improve the consistency of information and take into account gender issues when collecting data." [4]

In order to develop a common system to assess the progress of gender equality among the Member States, the Gender Equality Index for the European Union (GEI)

[1] Articles 2 and 3(3) TEU and Article 8 TFEU.
[2] 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)
[3] Article 3, Idem 1
[4] Idem1 and 2

has to be created. The GEI will be used to assess gender (in)equality at specific points in time and to identify domains where inequality meets the biggest gaps in each Member State. The development of the GEI should be seen as an important tool to promote gender equality in the EU.

The importance of the GEI is also recognised by the EU. In order to monitor progress and assess the state of affairs in the field of gender equality, the European Commission for the first time introduced the GEI in its policy document The Roadmap for Equality between Women and Men 2006-2010[5]. It was recognised that "The systematic collection and dissemination of reliable and comparable gender statistics and the creation of a Gender Equality Index would enable a better measuring of progress and form the basis of proper policy response." The development of the GEI is also included in the Action Plan of the European Commission Strategy for Equality between Women and Men 2010-2015[6]. The development of such an index is one of the major assignments attributed to EIGE in its Mid-Term Programme 2010-2012[7].

The construction of the GEI is based on harmonised statistics and on the development of common indicators to assess (in)equality between women and men and to follow-up on the progress in the field of gender equality. The GEI will help to identify strong or weak aspects of a national situation and to facilitate inter-country comparisons. For an accurate comparison, the GEI needs to be feasible and reliable. Therefore, it is important that the GEI calculates the availability of harmonised statistics parallel to the adequate number of the selected indicators.

In a context of gender policy analysis, gender sensitive and harmonised indicators are useful in identifying trends and drawing attention to gender inequalities, in setting policy priorities and in benchmarking or monitoring the policy implementation process. Furthermore, the development of a broader and more complex approach to existing inequalities relies on the continuing revision and updating of relevant indicators.

To date, commonly agreed or harmonised methodology do not exist at EU level which can offer solid and evidence-based grounds to compare the progress in gender equality by Member States. In 2003, both a feasibility study and analysis note "Towards an European Union Gender Equality Index" were produced by the European Commission[8]. Based on the universal caregiver model, ref. Fraser (1997), the study analysed five dimensions for the composition of the GEI. These were the equal sharing of paid work; equal sharing of money; equal sharing of decision-making power; equal sharing of knowledge; equal sharing of time. This first proposal for the construction of the GEI is built in such a way that the value indicates the actual distance of the country performance from a situation of full equality.

In 2010, EIGE further commissioned a preliminary study on the basic structure for the development of a broader and more coherent GEI. Within the framework of this study, revision of the previous work on the development of the GEI and other global/national/regional indices has been carried out. This work also identified the data sources (databases, surveys, administrative data sources) relevant for the

[5] EC(2006), A Roadmap for equality between women and men, COM(2006) 92 final http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2006:0092:FIN:EN:HTML

[6] http://ec.europa.eu/social/main.jsp?catId=89&furtherNews=yes&langId=en&newsId=890

[7] http://www.eige.europa.eu/content/important-documents

[8] Plantenga and all, "Towards an EU gender equality index - Feasibility study commissioned by and presented to the European Commission", Utrecht School of Economics/UMIST, December 2003

construction of the GEI at EU level. The final study results will be made available to the successful contractor.

Following the Fourth World Conference on Women in Beijing in 1995, the Council of the EU has since 1999 adopted a series of indicators in order to follow up the progress of gender equality, domain by domain. The adoption and signature of the Beijing Platform for Action (BPfA) in 1995 is a world landmark where national governments, namely the EU Member States, took-up the responsibility in finding ways of reporting and monitoring on the developments in the 12 BPfA areas of concern. Moreover, the European Commission has been supporting the development of specific statistics to monitor the evolution of some critical indicators. These include the gender pay gap, childcare coverage, share of women and men in decision-making positions and/or time-use, etc. The development of a conceptual framework and harmonised methodology for the GEI will benefit and be gradually complemented by EIGE's achievements in promoting the full implementation of the BPfA, including the development and updating of Beijing Indicators.

1.3 DESCRIPTION OF TASKS

1.3.1 Scope of work

An essential but complex step when developing the GEI for the European Union is to build the Statistical Information System (SIS) which will set the basis for the final choice of the dimensions to be included in the Index. The natural complexity of gender equality requires not only a mere selection of variables but a structured and classified system which explain how the selected variables are interrelated. Gender equality is the concept that must be explored and developed both from the perspectives of formal and substantive equality[9]. The explicit presentation of a conceptual framework for the SIS lies on the dimensions of the phenomenon of gender equality and their interrelations. The reference frame for the starting process of defining this conceptual framework should be based on previous studies implemented by the European Commission, by EIGE and the follow-up discussions with members of its Working Group on the GEI and Experts` Forum. In particular, the following relevant domains were identified for initial incorporation into the construction of the Index:

:

- Paid work;
- Income;
- Decision making power;
- Knowledge;
- Unpaid time;

[9] **Formal equality** embodies liberal notions of equal opportunity that emphasizes procedural equality. Every person is to be helped to compete equally on the basis of their individual talents.
Substantive equality concerns an equitable distribution or result (an equality of outcome), as opposed to equality of opportunity or treatment.
For additional information see:
http://www.eurofound.europa.eu/areas/industrialrelations/dictionary/definitions/EQUALOPPORTUNITIES.htm
Barlett Rhode(2010), Gender and Low: Theory, Doctrine and Commentary, Wolters Kluwer, New York:Asper publisher

- Health and health care;
- Gender based violence.

Following the results of the previous research under each domain, sets of indicators, which have already been developed[10], require clear identification including further assessing and exploring the availability of data. The possibility to include other relevant domains, resulting from the main findings of the studies previously carried out and further discussions with EIGE and its experts' groups must be considered.

The work that needs to be accomplished within the scope of this study is expected to provide:
- the structured classification and organisation of a statistical information system (according to the indicated domains), which is relevant to the consolidation of the theoretical framework of the GEI;
- the support in the calculation process of the GEI on the basis of the developed statistical information system.

This project should provide a Statistical Information System with data and exhaustive descriptions of the meta-information of the generating process of gender equality, which are relevant for the composition of the GEI. The meta-information description should include conceptual information, methodology, harmonisation of data within the Member States and institutional references. As a reference document, Annex 1 can support the identification of the initial information required[11].The work to be developed is expected to comprise a complementary approach towards EIGE's studies on data availability.

Examples of the EU data that should be reviewed in detail and reported on are:
- Eurostat statistics databases, such as the EU Labour Force Survey (LFS), Structure of Earnings Survey (SES) and the EU Statistics on Income and Living Conditions (EU-SILC) [12]
- United Nations Economic Commission for Europe (UNECE) Gender statistics database [13]
- Database on women and men in decision making positions [14]
- Harmonised European Time Use Surveys[15]
- Crime victim surveys that provide comparable data
- EUROFOUND databases[16]
- Other relevant EU databases and data sets on social and economic conditions with a gender dimension.

[10] Please note that the identification of indicators relevant for the measurement of the domains, within the conceptual framework of the Gender Equality Index, applies only to those which are already developed such as the Beijing Platform for Action indicators. The development of new indicators is not requested within the scope of this contract.

[11] See Annex 1

[12] http://epp.eurostat.ec.europa.eu/portal/page/portal/eurostat/home

[13] http://w3.unece.org/pxweb/

[14] http://ec.europa.eu/social/main.jsp?catId=764&langId=en

[15] https://www.h2.scb.se/tus/tus/

[16] http://www.eurofound.europa.eu/areas/gender/index.htm

The reference timeframe for the data and meta-information to be gathered within the SIS in the framework of this contract is from year 2005 onwards.

It shall cover all 27 Member States of the EU.

The possibility of translating information of critical importance from Member States' national languages into English must also to be considered.

1.3.2 Objectives

The overall objective of this project is the development of a Statistical Information System for the construction of the Gender Equality Index for the European Union.

The specific objectives are:

1. Develop a concept for the classification structure of a relational database, a Statistical Information System (SIS), to be used for the development of the Gender Equality Index

The study should provide the concept of architecture of the SIS aiming to collect data and meta-information and to assess the quality of data, including conceptual information, workflows, entity-relationship diagram, methodology, data flow diagram and institutional references. It should cover all available statistical information, data and related meta-information according to the domains and scope of work mentioned under 1.3.1. The concept of the SIS should also serve to improve the efficiency of data and meta-information, validation, processing, storage and dissemination. The structure and ideas for the design of the SIS should be inspired by the best practices of the international community of official statistics.

2. Produce the Statistical Information System for the collection and classification of input, process and output variables.

The SIS should provide exhaustive input, process and output level variables data linked together to define the process towards a measurable conceptual framework of gender equality.

For an efficient management of the SIS, the collection and storage of data and meta-information must be structured and classified. The information to be collected should be identified by variables and classified according to their level as input, process and output[17]:

a) input, which identifies the needs to implement measures. It is a starting point of the information collection process for the measurement of gender equality;
b) process, which takes into account specific country needs that can also represent obstacles to the implementation of measures. If this is the case, a contractor should highlight and document obstacles case by case for each country;

[17] OECD -ECJRC(2008), Handbook on constructing composite indicators: methodology and user guide http://composite-indicators.jrc.ec.europa.eu/Handbook.htm

c) output, which is considered as a result of implementation of measures. It is an ending point of the information process.

Data and meta-information should be reported at all levels. The related information on the development of the three steps, including strengths and possible weaknesses, should be taken into account.

The information mapped through the collection and classification process has to be translated into measurable indicators when possible[18]. Therefore a complete relational database must be constructed. It will serve as the main tool for construction of the GEI. Integrity, sharing, availability and retrieval of data are the principles to be applied when building a database.

3. Review the research carried out within the framework of the study.

An analysis of the problems encountered in the development of the SIS concept and its database should be provided.

4. Provision of assistance on the construction of the GEI.

The GEI will be methodologically constructed on the basis of the developed SIS. The accomplishment of the objectives defined above should reflect the dimensions of the multi-dimensional phenomenon of gender equality to be measured. By using the structured SIS, a series of statistical tests and calculations will need to be implemented in the process of the Index construction.

1.3.3 Tasks

The related task to each specific objective is:

Objective 1: **Develop a concept for the classification structure of a relational database, a Statistical Information System (SIS), to be used for the development of the GEI.**

[18] An example for the organisation of meta-information is provided by Eurostat's metadata server where the information presented is organised in categories so that users can easily find what they are looking for. The following categories are made available:

- Concepts and definitions
- Classifications
- Methodologies
- Legislation
- Glossaries and Thesaurus

For further information, see Eurostat's Metadata Server
http://ec.europa.eu/eurostat/ramon/index.cfm?TargetUrl=DSP_PUB_WELC

Task 1

In order to have a clear understanding of the interrelations among the variables which will be used in the construction of the GEI, the phenomenon of gender equality should be treated as a process. The goal of this task is to project and implement a "whole system" in each and every component:

a) **definition of the context and identification of the boundaries**[19]: this phase deals with the description of

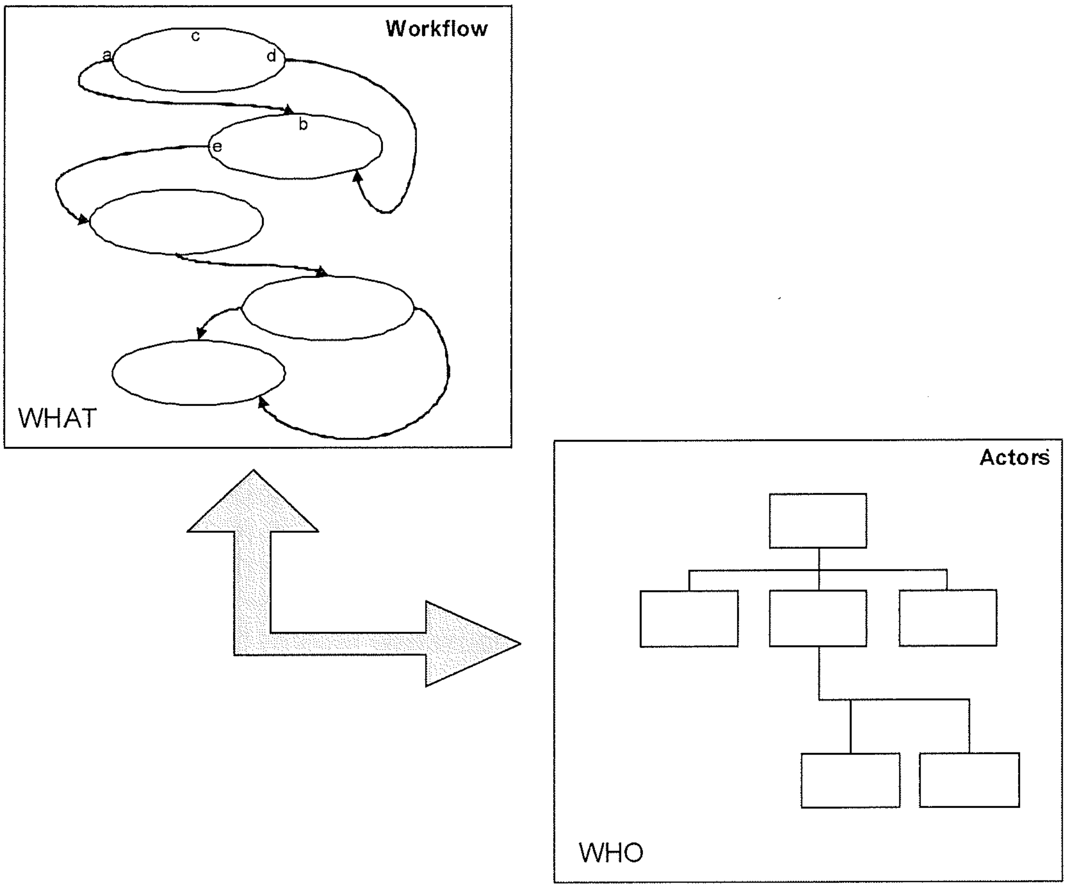
- the state of art which starts from the literature review and the relevant policy analysis,
- the identification of the boundaries of the strategic context with the external and internal constraints.

This phase will benefit from the research and studies carried out by EIGE, and it is supposed to start from literature review and policy analysis.

b) **identification of actors**: after having bounded the context, the next phase deals with the identification of the actors. This phase aims to identify the workflow which regulates the gender equality process relevant for the construction of the GEI for the European Union. In particular the methodology classifies all units of work into workflows by identifying different types of actors according with the role they play.
Taking as example childcare, the actors who might have a role are among others: children, parents, relatives, day-care centres, the ministry of education. Each actor generates a workflow which depends on the level of their interaction. The ministry of education might play a role at input level, while children are the final actors who are supposed to receive the service.

[19] Bergamasco S., M. Gandolfo, S. Terracina, A. Toma, Action Workflow Analysis: A Methodology for Analysing Statistics Production Process, Q2001

Figure 1: Example of mapping an information system



Each workflow unit needs to be graphically represented as a workflow loop. Processes can be modelled as a series of workflows, with different participants/actors to whom are assigned the roles of customers or performers.
The relationships among workflows are represented by putting all the workflows on a map and drawing links between them, according with the level of their interaction (as input or outcome). Maps create a common graphical language that displays all stages of workflows.
This modelling is based on the integration of two parts: the entity-relationship diagrams, represented by the workflows/actors, figure 1, and the data flow diagrams represented by the available data linked to the workflow (eg. EU-SILC, LFS etc.). The result is the identification of the information system and the structured knowledge of the systems for managing each process.
This modelling is the architecture of a Statistical Information System to be developed.

Objective 2: **Produce the Statistical Information System for the collection and classification of input, process and output variables.**

Task 2

The SIS should be built on a common data hierarchy or structure, based on a set of different levels with meta-information attached. In order to distinguish between the levels and to ensure the quality of the meta-information describing different aspects of the data, a common terminology for different levels in the hierarchy needs to be introduced. Data should be treated as an asset. Therefore, the database should ensure security, safety and storage to data and meta-information.

The information to be collected for both layers (production and storage) of the SIS should be identified by variables which will be structured according to their level (input, process, and output).

Data and Meta-information should include:

a) data description:
b) statistical concept and definition
c) identification of the sources chosen for the gender equality intervention;
d) unit of measure
e) country coverage;
f) time coverage;
g) institutional references and framework of the respective sources;
h) conceptual meta-information, describing the concepts used and their practical implementation, allowing users to understand what the statistics are measuring and their applicability for the construction of the Index;
i) methodological meta-information, describing methods used for the generation of the data (sampling and collection methods, editing processes, transformations);
j) quality meta-information, describing the different quality features of the resulting statistics, such as timeliness , accuracy and reliability, relevance, comparability over time and geographical, coherence
k) assessment and improvement of the data quality.

Objective 3: **Review the research carried out within the framework of the study.**

Task 3

Develop a report on the research related to the design of the SIS, including its concept, structure, the ways of entering and organising data, strengths and limitations of the system, data quality assessment, etc. The report should assess the work implemented, the problems encountered and needs to outline recommendations for further actions in the subsequent project steps.

At this stage the contractor should report on the usefulness and functionality of the developed SIS to meet the goal of this contract.

The following requirements should be taken into account on carrying over this task:

- Clarification the objectives of the architecture defined for the SIS;
- Interrelation of the various parts of work;
- Maintenance of effective reporting and communication with EIGE;
- Revision of the SIS in terms of problems encountered, bottlenecks and improvements to be made.

Objective 4: **Provision of assistance in the development of the GEI.**

Task 4

The contractor will make available the support of one researcher for 45 person/days to work at EIGE. The profile of the researcher is described under point 1.3.8 on the Project Team.

The researcher will support EIGE in its work on calculations and statistical analysis to be carried out for the GEI, for instance:

- Multivariate analysis;
- Normalisation of data;
- Weighting and aggregation;
- Robustness and sensitivity;
- Identifying links to other variables;
- Developing a report assessment on the activities implemented during the 45 days.

The researcher will work under the supervision of EIGE's team responsible for the development of the GEI. All necessary supporting equipment will be provided by EIGE.

1.3.4 Applied methodology

The concept of the Statistical Information System should result in a relational database which takes into consideration the relation among different levels of information. The fundamental steps towards the construction of the Statistical Information System are:

1. identification and definition of the institutional and policy references of data sources;
2. identification of available information assets which includes documents, databases, application systems;
3. classification of information according to their level (input-process-output);
4. creation of a relational database in its two-fold layers:
    a. production layer
    b. storage layer
    c. dissemination layer.

The proposed methodology should consider the time limits and provide opportunities to analyse the amount of information available within a given time. The contractor must propose a methodology which would minimise the possibility of a subjective interpretation of the data by the researchers or those who will collect the data in the field.

The production of the deliverables within the framework of the study needs to be developed in close cooperation with EIGE's team responsible for the GEI. Therefore, a reporting system is expected to be incorporated into the proposed methodology. This is particularly essential in the process of building the Statistical Information System during the first phase of the project.

1.3.5 Deliverables

The Contractor will be expected to work closely with EIGE through a regular exchange of information. The expected deliverables are:

1. An **Initiation report**, summarising the discussion of the first meeting of minimum 6 pages (W2).
2. An **interim report-1,** the proposed architecture of the Statistical Information System for the GEI covering the description of the methodology, the plan of activities, the definition of the institutional and policy references of data sources on gender equality measures and the identification of available information assets of minimum 30 pages (W7).
3. An **interim report-2** covering the detailed explanation of the architecture of the Statistical Information System, the modelling and the mapping of workflow and actors, the identification of the variables, their information sources of minimum 30 pages (W14).
4. The **complete database** of the Statistical Information System classified with its **log file** (W20).

5. An **interim report-3** reporting on the implementation of the research related to the design of the SIS with a detailed explanation on how to use the tool for entering and organising data of minimum 30 pages (W20)
6. A final **report** with a detailed analysis of the whole process of the project:

   a. the construction and use of the SIS;
   b. the development of the GEI.

   This report shall have a minimum of 60 pages including all annexes and bibliographical references; statistical annexes, documenting the report, will be provided separately; (Final report, W44)
7. A **summary report** of no more than 10 pages explaining the main findings (W46).

All the deliverables listed above must be submitted in **English**.

Reports and related materials must be written in clear English and in an uncomplicated fashion, and should be easily-digestible providing information and analyses that can be understood by non-academics. They must be in MS Word or PDF format, the format of the annexes may vary depending on the type of information to be shown.

Final versions of all deliverables must be professionally edited and proofread in native English by the Contractor. The documents must be delivered in an appropriate layout and they should contain visual elements (e.g. tables and graphs).

The Contractor must provide the Institute with the deliverables in strict compliance with the deadlines listed for each deliverable. If necessary, activities aimed at producing deliverables, must run in parallel 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, expected from the third party.

All the reports with corresponding Annexes should be provided in 2 hard copies and in an electronic copy, with the exception of the final report (detailed analytical report and executive summary) which should be provided in 4 hard copies and in an electronic copy.

Deliverable 1: Initiation report

Within **two weeks** from the contract signature, EIGE will organise an initiation meeting in Vilnius with the Contractor to discuss the Technical Specifications and the Contractor's offer.

In the first meeting, the Contractor shall present in detail how the method proposed is going to be implemented in light of the initial assessment of information and data, and in particular, how the specific objectives and tasks will be implemented.

Based on the agreements reached during this meeting, the Contractor will draw up an Initiation report which is to be submitted to EIGE for approval within 5 days after the first meeting. The Initiation report will present the organisation of work, the planning and timeline for all activities of the project within the contractual deadline, information on the staff members and their contact details. The document may present results of some initial analysis.

Size: minimum of 6 pages

Language: English

Deadline: The Contractor shall prepare an Initiation report summarising the elements above and submit it to EIGE within **5 days** after the first meeting. EIGE shall have 10 working days from receipt to approve or comment the report. Within 5 days of receiving EIGE's comments, the Contractor will submit additional information and the Initiation report in the definitive form.

Deliverable 2: Interim report-1

The **Interim report,** showing progress of the work, shall be submitted to EIGE and presented in an interim meeting in Vilnius.

The Interim report-1 shall include the following:

- The proposed architecture of the Statistical Information System for the GEI comprehensive of the map of the entity-relationship diagram and the data flow diagram.
- A description of the methodology used and the problems encountered;
- Definition of the key terms and concepts regarding the institutional and policy references of data sources on gender equality;
- Identification of available information assets;
- An updated work-plan ensuring the classification scheme;
- An indicative provisional structure for the final report covering the definition of the institutional and policy references of data sources on gender equality measures and the identification of available information assets.

Size: minimum of 30 pages

Language: English

Deadline: **7 weeks** after the date of signature of the contract the Contractor should provide the Interim report-1 to EIGE and to participate in the first interim meeting in Vilnius. EIGE shall have 10 working days from receipt of the report to comment it or approve. Within 5 working days of receiving EIGE's comments, the Contractor shall submit additional information and the final deliverable in definitive form.

Deliverable 3: interim report-2

The detailed explanation of the architecture of the Statistical Information System should present the scheme where each variable falls regarding its level of input, process and output. The information sources of the variables have to be identified. This report should provide the structure on how the SIS is going to be organised according to the layers of production and storage as described under objective 2 and its related task.

The Interim report-2 shall include the following:

- A description on how the information and meta-information is going to be structured and organised;
- A proposal on how SIS should be organised according to the structure of the data;
- An assessment on the quality of data;
- A glossary of the statistical terms.

Size: minimum of 30 pages

Language: English

Deadline: **14 weeks** after the date of signature of the contract the Contractor is expected to provide the Interim report-2 to EIGE and to participate in the second interim meeting in Vilnius. EIGE shall have 10 working days from receipt of the report to comment, provide feedback and/or approve. Within 10 working days of receiving EIGE's comments, the Contractor shall submit additional information and the final deliverable in definitive form.
The period between the deliverable 3 and 4 should be used to interactively discuss with EIGE's index team the most suitable and convenient structure of the SIS.

Deliverable 4: Complete database and its log file

The complete database and its log file should be released by using the most appropriate software the tenderer and EIGE will agree.

Language: English

Deadline: **20 weeks** after the date of signature of the contract the Contractor is expected to provide the complete database and its log file to EIGE and to participate in the fourth meeting in Vilnius. EIGE shall have 10 working days from receipt of the deliverable to comment, provide feedback and/or approve. Within 10 working days of receiving EIGE's comments, the Contractor shall submit additional information and the final deliverable in definitive form.

Deliverable 5: Interim report-3

Together with the complete database and its log file the contractor should prepare a comprehensive report on how to use the database constructed. The report should reflect how the principles of integrity, sharing, availability and retrieval of data were applied in the production of the database and a comprehensive assessment of quality of data.

The Interim report-3 shall include the following:

- Description of the understanding of the background analysis for the production of the database;
- Information directly related to the quality of data;
- Detailed description on how to use the database and its log file;
- A glossary of the meta-information in the SIS.

Deadline: **20 weeks** after the date of signature of the contract the Contractor is expected to provide the interim report-3 which will also be discussed in the third interim meeting in Vilnius. EIGE shall have 10 working days from receipt of the Interim report -3 to comment, provide feedback and/or approve. Within 10 working days of receiving EIGE's comments, the Contractor shall submit additional information and the final deliverable in definitive form.

Size: minimum of 30 pages

Language: English

Deliverable 6: Final report

The **final detailed analytical report** should be in line with the methodology proposed and agreed during the inception meeting and reported in the inception report. It should answer all the requests in the specific objectives and the related tasks. Judgements, conclusions and recommendations provided shall be clear and explicit.

The Report with corresponding Annexes should be provided in 4 hard copies and in an electronic copy.

The Analytical report shall include the following:

- Description of all the information needed for the understanding of the background analysis of the project;
- Detailed description on how the project implemented responded to the objectives of the terms of references;
- A short report on the activities implemented during the 45 days;
- Identification of the methodology implemented and the problems encountered
- Description of all the references and sources reviewed or consulted during the project;

- A comprehensive glossary including statistical terms, meta-information and sources used;
- Conclusions and recommendations in line with what has been agreed in the initiation report.

Size: minimum 60 pages and relevant annexes

Language: English

Deadline: **44 weeks** after the date of signature of the contract the Contractor is expected to provide the Report to EIGE and to participate in the final meeting in Vilnius. EIGE shall have 15 working days from receipt of the analytical report to comment, provide feedback and/or approve. Within 20 working days of receiving EIGE's comments, the Contractor shall submit additional information and the final deliverable in definitive form.

Deliverable 7: Summary report

An executive summary will outline the main findings in a concise format and will be developed for wider dissemination. It should present an overview of the analysis findings in a format allowing it to make important decisions on the GEI. The overview provided shall be clear and explicit and should be illustrated with relevant graphics. The executive summary should be supplied in a final, publishable format in its PDF and editable formats (e.g. EPS, Quark etc.) - in line with EIGE's visual style guide20.

Size: 10 pages

Language: English

Deadline: **46 weeks** after the date of signature of the contract the Contractor is expected to provide the Summary report to EIGE. EIGE shall have 10 working days from receipt of the executive summary to comment, provide feedback and/or approve. Within 10 working days of receiving EIGE's comments, the Contractor shall submit additional information and the final deliverable in definitive form.

1.3.6 Provisional timeline

The overall provisional timeline is the following:

Deliverable 1: Initiation meeting and report	W2
Deliverable 2: Interim report-1/interim meeting	W7

[20] http://www.eige.europa.eu/sites/default/files/documents/eige-style-guide.pdf

Deliverable 3: Interim report-2/interim meeting	W14
Deliverable 4: Complete database and its log file	W20
Deliverable 5: Interim report-3/interim meeting	W20
Deliverable 6: Final report	W44
Deliverable 7: Summary report	W46

A detailed timeline should be provided in the offer.

1.3.7 Responsibility

The overall responsibility for executing the contract, including the implementation of all measures necessary to provide the Institute with deliverables of the highest quality on time, lies with the Contractor.

1.3.8 Project team

The tenderer must clearly indicate how they intend to organise the project team. The team must include:

- one Project Manager;
- at least two Researchers with at least **4 years** of research experience in gender equality issues;
- three Statisticians with proven experience in constructing statistical information systems;
- one Researcher who will assist EIGE in the construction of the GEI. This researcher will provide their services on an intra-muros basis for 45 person/days. (S)he must have an educational background in Statistics, Mathematics or related fields with a minimum of **5 years** experience in these areas after the first university degree. The expert needs to demonstrate the 5 years-experience in applied statistics (data mining, data validation, multivariate statistics, etc), be able to develop the own programme code and preferably be an expert user of Matlab. The assistance requires excellent skills in working in team, good capacity of presenting and delivering results in a structured way, respecting strict deadlines, needs to be self-motivated and with a very good knowledge of English.

The project manager is in charge of coordination and administrative tasks of the project, as well as contacting and informing the EIGE about all aspects related to the execution of the contract. The full team is responsible for the content and quality of all the deliverables as to make sure that they are in line with gender equality objectives set for this contract.

The possibility of an interview with EIGE staff for the selection of the researcher should be considered.

The tenderer:

- must demonstrate the capacity to set up the appropriate organisational structure to carry out all the tasks under this contract as well as demonstrating a proven capacity to manage the administrative and financial aspects of such a contract;
- must have proven capacity to liaise with the relevant actors on EU and Member States' level;
- must demonstrate significant professional experience in an EU (or international) context, in particular the capacity to rely on national competences and/or experiences to collect the necessary information for all EU 27 Member States. EIGE will assess this criterion, inter alia, on the basis of a list of organisations on which the Contractor can rely on for the countries concerned by the contract and an organisational chart explaining the structure to be put in place;
- must demonstrate the highest quality in technical writing (in English) and have published scientific papers in international journals..

The implementation of the Contract will require knowledge and expertise in the following areas:

- understanding and knowledge of the European and national contexts in regard to gender equality;
- development and use statistics and data at national and European level;
- assessment of data quality, measurability, comparability and interpretation of data;
- experience in constructing statistical information systems;
- experience and knowledge on the European Union policies and strategies on gender equality;
- experience in the synthesis and analysis of large amounts of information;
- experience in drafting analytical reports in an European context;
- experience in applied statistics.

The team working on the project must possess strong analytical and drafting capacities and demonstrate a very good command of the English language.

Project managerial staff of contractors and subcontractors if any will be proven by the following:

- Indication of educational 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;
- the CVs (a common European format) of the members of the team must be enclosed and must clearly show evidence of the skills required. The form can be downloaded from:

http://europass.cedefop.europa.eu/europass/home/hornav/Downloads.csp

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

1.3.9 Communication

Communication between the Contractor and the Institute shall be possible by phone, video-conference and email during the EIGE's working days and hours.

During the course of the contract period, in addition to the first meeting to be held in EIGE's premises in Vilnius, at least 6 more meetings are envisaged between the Contractor and representatives of EIGE. At the first meeting the objectives of the project will be discussed in detail, and, in particular, the research methodology and the project timeline as defined in the technical proposal submitted by the Contractor during the tendering process.

At the following meetings the representatives of EIGE and the Contractor will discuss the outputs delivered. In a final meeting at the end of the contract period, the Contractor will be asked to present the final report to the representatives of EIGE. During the meetings information on the implementation, quality control will be exchanged. All working meetings will take place in Vilnius at EIGE's premises, with the exception of the 27 meetings to be organised in the Member States.

Additionally to these meetings the Contractors may be invited to participate in:

- Three working meetings of EIGE`s Working Group on the EU Gender Equality Index to be held in Vilnius by the 4th Quarter of year 2012 in order to give a presentation on the main findings of the project;
- International consultation seminar on measuring gender equality in Europe organised by EIGE to be held in Vilnius by the 4th Quarter of year 2012, in order to give a presentation on the main findings of the project.

In addition to these meetings/events, EIGE may at its own cost send representatives to the Contractor's headquarters for any additional ad hoc meetings that may be required.

1.3.10 Monitoring of project implementation

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

The successful tenderer should expect that the European Court of Auditors and the European Anti-Fraud Office (OLAF) have the right to gain access to all documentation relating to the project and, therefore, must keep copies of all relevant and related documents.

EIGE's staff may, during the duration of the project, visit the Contractor's offices and/or the sites where the project is carried out to assess the quality of the work.

1.3.11 Assessment of results

The results will be assessed by EIGE as to their usefulness to the final goal of this project which is the development of the GEI; hence on: the clarity of presentation of the reports, the respect of deadlines, the quality, practicality, usefulness and level of detail of the products delivered, the quality and clarity of the analysis and the quality of translations when needed.

In particular, EIGE will focus on the following:

Task	Key indicators to assess the results
1. Reports	- clarity of presentation of the reports; - respect of deadlines;
2. Definition of the architecture of a Statistical Information System	- quality and clarity of the analysis: relevance and accuracy of the information; - practicality of the output delivered: usefulness and level of detail; - readability of the output delivered: ease of reading specifically short, clean sentences, active voice, accessible and coherent vocabulary throughout the text – taken into account that the readers could be English native speakers and non English native speakers; - respect of deadlines;
3. Production of a Statistical Information System	- accessibility of the database: an user-friendly output, the quality, accuracy and clarity; - proper functioning of the interactive outputs: the smallest amount possible of broken hyperlinks and other bugs; - full compliance with the criteria requested to the

	structure of the database; - respect of deadlines;
4. Provision of assistance in the development of the EU Gender Equality Index	- efficient performance in the support of the quantitative analysis of the data for the construction of the GEI; - sense of responsibility; - level of effectiveness (speed of delivery, taking into account possible linguistic limitations); - completeness, coherence and technical quality of the work developed during the construction phase of the GEI; - punctuality; - respect of deadlines;

2 THE TENDER

2.1 SUBMISSION OF THE TENDER

- Participation in this tender (including each member of a consortium if applicable) is open on equal terms to all natural and legal persons coming within the scope of the Treaties and to all natural and legal persons who are nationals of a third country which has a special agreement with the European Communities in the field of public procurement under the conditions laid down in that agreement.

- 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.

  Late delivery will lead to the exclusion of the tender from the award procedure for this contract. Offers sent by e-mail or by fax will also be non admissible. Envelopes found open at the opening session will also lead to non-admissibility of the tender. Consequently, tenderers must ensure that their bids are packed in such a way as to prevent any accidental opening during its mailing.

- The tender must remain valid for a period of **11 months** from the final date for submission of the tenders. Where the initial contract is stated to be renewed, the offer will remain valid for such renewals. Upon renewals of contracts, the Institute reserves the right to request updated forms for exclusion and selection criteria. If the situation concerning these requirements has altered, any changes must be reported immediately to the Institute.

- 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 his/her 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 the Institute has accepted the tender, it shall become the property of the Institute that shall treat it confidentially.

- The Institute 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 shall apply to this invitation to tender.

2.2 OPENING OF TENDERS

Tenders will be opened on

14/10/2011 at 14:30 EET (Vilnius time)

at the following location:

European Institute for Gender Equality Švitrigailos g. 11M, 03228 Vilnius, Lithuania

One authorised representative of each tenderer may attend the opening of the bids as observer. Companies wishing to attend are requested to notify their intention at the latest 2 working days in advance to the following e-mail address: procurement@eige.europa.eu.

This notification must contain an authorisation document signed by an authorised officer of the tenderer and specify the name of the person who will attend the opening on the tenderer's behalf. The credentials of the representative will be checked by EIGE.

2.3 CONTACTS with the INSTITUTE

In principle, no contact is permitted between the Institute and the tenderer during the tendering procedure. However, contacts may exceptionally be permitted – these cases are specified in the Invitation letter.

Under the conditions described in the Letter of Invitation, further information can be obtained by sending a request to:

e-mail: procurement@eige.europa.eu

Provided it has been requested in good time, such additional information will be supplied simultaneously to all economic operators by posting it onto EIGE web-site, Internet address **http://eige.europa.eu**. The Institute is not bound to reply to requests for additional information received less than five working days before the final date for submission of tenders.

The Institute will inform interested parties of the existence of an error, a lack of precision, an omission or any other type of defect in the documents relating to this call for tenders by supplying information on the Internet address **http://eige.europa.eu** .

During assessment procedure, the Institute may require some clarification in connection with a tender, or if obvious clerical errors in the tender must be corrected. In any event, such contact must not lead to any amendment of the terms of the tender.

2.4 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, the Institute may disqualify the bid. The Institute 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 must be clear and concise, with continuous page numbering, and assembled in coherent fashion (e.g. bound or stapled).

Tenderers are recommended to submit their tenders in English, the working language of EIGE.

All tenders must include:

A. Covering letter signed by the tenderer or his/her duly authorised representative

B. Table of contents

C. Five sections:

Section One: Administrative information,

Section Two: Documents related to the Exclusion criteria

Section Three: Documents related to the Selection criteria

Section Four: Technical proposal addressing technical specifications and award

Section Five: Financial proposals

Standard submission forms are annexed to these specifications

2.4.1 SECTION ONE: ADMINISTRATIVE INFORMATION

The Tenderer must provide the following identification documentation:

- Tenderer identification Form

  The tenderer identification form is to be provided in original, 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 provided in original 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/execution/legal_entities_en.htm

- 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/execution/ftiers_en.htm

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 an original of filled in and 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, qualifications and experience of each member of the group, as well as who has been appointed by the others as the group leader.

In case of a joint offer, only the group leader must return the financial identification form.

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 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).

If the Tenderer envisages subcontracting, 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.

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

The main contractor retains full liability towards the Institute for performance of the contract as a whole. Accordingly:

- the agency 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.

In case subcontractors are identified before submission of the offer, all considerations concerning exclusion and selection criteria that apply to subcontractors must be included in the offer. Prior written approval from EIGE is necessary in order to replace a subcontractor and/or have work which was not originally subcontracted in the original tender carried out by third parties.

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

2.4.2 SECTION TWO. EXCLUSION CRITERIA DOCUMENTATION

A. Tenderers (including consortium members in case of a joint offer and subcontractors in case of subcontracting) or their representatives, shall provide an original **Declaration on honour**, duly signed and dated in which they:

- state whether or not they are in one or more of the situations referred to in Articles 93 and 94 of the Financial Regulation and detailed in the SSF;
- undertake to submit to EIGE any additional document relating to the exclusion criteria, that the Institute considers necessary to perform its checks, within seven calendar days following the receipt of the agency's request.

By returning the above-mentioned Declaration, duly signed, Tenderers confirm that they have been notified of the following points:

- Administrative or financial penalties may be imposed by the Institute on Tenderers who are in one of the cases of exclusion provided for in Articles 93 and 94 of the Financial Regulation after they have been given the opportunity to present their observations.
- These penalties are detailed in Article 96 of the Financial Regulation and Articles 133a and 134b of the Regulation laying down the rules for implementing the Financial Regulation (2342/2002/ of 23.12.02).

B. The tenderer to whom the contract is awarded shall provide, within 15 days following the receipt of the letter informing him 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.

EIGE will accept, as satisfactory evidence that the tenderer is not in one of the situations described

- in point **(a), (b) and (e) of the Declaration**, production of a recent extract (dated no earlier than 4 months before the deadline for submission of tenders) from the judicial/criminal records or, failing this, a recent equivalent document issued by a judicial or administrative authority in the country of origin or provenance attesting that these requirements are satisfied;

- in point **(d) of the Declaration,** a recent certificate (dated no earlier than 4 months before the deadline for submission of tenders) issued by the competent authority of the State concerned. These documents must provide proof of payment of all taxes and social security contributions for which the tenderer is liable, including VAT, income tax (natural persons only), company tax (legal persons only) and social security contributions.

Where no such certificate or document is issued in the country concerned, it may be replaced by a sworn or, failing this, solemn statement by the interested party before a judicial or administrative authority, a notary or a qualified professional organisation in his/her country of origin or provenance.

EIGE will accept, as satisfactory evidence that the tenderer is not in one of the situations described:

- in points **(c) and (f) of the Declaration**, recent certificates issued by competent national authorities;

If the tenderer is a legal person and the national law of the country in which he is established does not authorise legal persons to provide such documents, the documents (such as the judicial/criminal records) must be provided by natural persons with powers of representation in relation to the tenderer.

Where they have doubts as to whether tenderers are in one of the situations of exclusion, EIGE may itself apply to the abovementioned competent authorities to obtain any information they consider necessary about that situation.

EIGE may waive the obligation of a tenderer to submit the abovementioned documentary evidence if such evidence has already been submitted to it for the purposes of another procurement procedure and provided that the issuing date of the documents does not exceed one year and that they are still valid. In such a case, the tenderer shall declare on his honour that the documentary evidence has already been provided to the Institute in a previous procurement procedure and confirm that no changes in his situation have occurred. He shall indicate in its tender all the references necessary to allow the Institute services to check this evidence.

2.4.3 SECTION THREE: SELECTION CRITERIA DOCUMENTATION

This part of the tender concerns the evidences relating to the economic and financial 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. In that case, evidence must be provided, that it will have at its disposal the resources necessary for performance of the contract, for example by producing a clear undertaking on the part of those entities to place those resources at its disposal.

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, to the extent that the subcontractor puts its resources at the disposal of the tenderer for the performance of the contract.

In case of joint tender, if criteria, as regards the turnover, are to be achieved above a certain level, a consolidated assessment shall be made.

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 on of subcontracting not more than 30% of the contract, provided the main contractor does not rely on the subcontractor's economic and financial capacities, the subcontractor(s) does not have to provide the economic and financial capacity form. However, EIGE reserves the right to request additional information for the evaluation of the economic and financial capacity.

A. Economic and financial capacity

Tenderers must provide EIGE with sufficient poof 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.

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

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. Please observe the following aspects in completing this financial statement:

1. It should be presented in original and certified by means of a signature of the chief accounting officer of the tendering organisation.
2. EIGE has the right during the tendering process and before awarding the contract to request further evidence on the tenderer's compliance with the economic and financial capacity requirement, in which case balance sheets and profit and loss accounts for the past financial years may be requested.

   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.
3. 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.
4. The statements of Economic and financial capacity should be included in the offer for all consortium partners.

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

B. Technical and professional capacity

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

The technical and professional capacity of the tenderers to provide the services required will be assessed in particular with regard to their know-how, efficiency, effectiveness, experience, reliability and in line with requirements put in Section 1.3.8 of these specifications.
Evidence of the technical and professional capacity shall be furnished by the following documents:

a) Experience in other similar projects: list of principle services provided in the past 5 years, with sums, dates and recipients, public or private, with a short description of the project (a minimum of 2 projects similar to the subject of the tender is required). EIGE shall be authorised to contact the indicated person for verification.
b) Professional capacity of the personnel and ability to carry out the tasks
Annual staff turnover indicating the number of managerial staff and research personnel.
c) if a tenderer intends to subcontract any part of the services, an indication of the proportion of the contract which the service provider may intend to subcontract has to be shown (Subcontracting Form in Standard Submission Form).

2.4.4 SECTION FOUR: TECHNICAL PROPOSAL

In the Technical proposal, 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.

This section is of 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 proposal to which the Tenderers should pay particular attention. The technical proposal 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 proposals deviating from the Technical Specifications may be rejected for non-conformity.

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 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 technical proposal must present the tenderer's view at, approach to and solutions for the work described in the Technical Specifications, as regards the Scope and coverage, meeting the Objectives, implementing the Tasks and providing Deliverables.

Tenderer's ability meeting deadlines must be clearly demonstrated

(a) Project Management

Understanding of the objectives of the contract

For this criterion, the evaluation committee will assess to what extent the tenderer has understood the assignment and the context in which it will be carried out.

Work Plan

The tenderer should present a detailed Work Plan proposal in the technical proposal, indicating key stages of the project, their duration and expected milestones. The Work Plan should be based on these Technical specifications and should indicate how the project activities will be implemented.

The technical proposal must also show what measures will be in place to assure the quality management of the project and respective deliverables.

For this criterion, the evaluation committee will assess whether the tender is clear and understandable; general management approach, including work organisation and the work plan proposed; the approach and method of coordination proposed to ensure the setting up and monitoring, the quality, homogeneity consistency of the work to be delivered.

A short but precise tender with tables and examples will be positively assessed.

Composition of the project team

Please refer also to section 1.3.8. "Project team".

The tenderer should present a proposal outlining the organisation and composition of the project team, specifying respective roles and contributions.

The technical proposal must indicate how the tenderer intends to organise the project team, according to the project team described under the heading 1.3.8.

The tenderer's technical proposal should indicate clearly the amount of time each team member will devote to the project.

(b) Project Methodology and Tools

Please refer also to section 1.3.4. "Applied methodology".

The tenderers must justify their choice of a specific methodology for conducting the research on the domains, variables and indicators to be included in the composition of the conceptual framework of the Gender Equality Index. The analysis must be described in detail as well as the proposed approach. The choice must be grounded in established social science research methodologies, the background to which should be outlined. Tenderers should have extensive experience of having used the chosen methodology or methodologies, in practice, in at least one Member State.

Efficiency, quality and usefulness of the methodology and tools in regard to the proposed deliverables will be assessed.

Efficiency and effectiveness of approach and method

The proposed implementation for the project should demonstrate efficiency and effectiveness of approach and method taking into account the project particularities mentioned in the technical specifications.

Level of detail and clarity of the offer

The description of services to be provided should be sufficiently clear and detailed particularly regarding the practical application on how to achieve the project's goals and outputs. If possible, with examples to demonstrate that it will work.

Presentation of the expected results

A clear and complete description of the tangible results to be attained within the frame of this contract should be presented.

c) Data Protection and Copyright

Tenderers must clearly show in their technical proposal how they will ensure that the research will comply strictly with national and EU data protection legislation, especially Regulation (EC) No 45/2001 and Directive 1995/46/EC, as well as Regulation EC No 322/97 on the processing of data for statistical purposes.

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.

2.4.5 SECTION FIVE: FINANCIAL PROPOSAL

All tenders must contain a financial proposal section which shall [be] [consist of]:

The Financial Proposal Form (template presented in “Standard Submission Forms”).

The maximum volume of the contract is estimated at 450.000 EUR, excluding VAT. Tenders presenting a total price superior to this maximum amount will be excluded.

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 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;
- 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;
- other costs might include: travel costs, translation expenses, any expenses for meetings' facilities or other direct costs (to be specified in detail) relative to the deliverables.

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 THE TENDERERS

Stage 1 - Application of exclusion criteria

The aim is to check whether tenderers are eligible to take part in the tendering procedure.

The eligibility of the tenderer will be evaluated on the basis of the documents submitted as indicated in Section 2.4.2 A 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 tender shall be excluded.

Stage 2 - Application of selection criteria

The aim is to check the technical and professional capacity and economic and financial capacity of each tenderer who has passed the exclusion stage.

The eligibility of the tenderer will be evaluated on the basis of the documents submitted as indicated in Section 2.4.3 Selection criteria. All tenderers will undergo strict evaluation of conformity to selection criteria laid down in the Tender Specifications. The Tenderers not satisfying the selection criteria will not be selected and their offers will not be further evaluated against award criteria.

In case of joint offers or/and subcontracting:

- For minimum viability standards on financial and economic standing an individual evaluation shall take place;
- The selection criteria for technical and professional capacity will be assessed in relation to the combined capacities of all members of the consortium and subcontractors, as a whole.

3.2 EVALUATION OF THE TENDERS

Stage 3 - 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 Proposals will be evaluated according to the following technical award criteria:

Criteria number	**Criteria description**	**Maximum points per criteria**	Minimum required score
1	Project management:	**40**	*20*
	- Understanding of the objectives of the contract	**15**	
	- Work Plan	**15**	
	- Composition of the project team	**10**	
2	Project methodology and tools:	**50**	25
	- Efficiency and effectiveness of approach and method	**20**	
	- Level of detail and clarity of the offer	**15**	
	- Presentation of the expected results	**15**	

3	Data protection and copyright	10	5
Total		**100**	

Tenders scored either below the minimum score required per criterion and below 70 out of total 100 points will be excluded and thus not be considered for the next step of the evaluation

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

B. Financial evaluation

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

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 quality and the price ratio, in accordance with the following formula:

Final score for Tender = Technical score x 1.000.000 / Price

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.

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

3.3.2 Information to tenderers

Upon respective written requests made by the tenderers, EIGE will inform all rejected tenderers of the reasons for their rejection and all tenderers submitting an admissible tender of the characteristics and relative advantages of the tenders selected for the contract award and the name of the successful tenderers.

However, 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 contracts with the successful tenderer until a standstill period of 14 calendar days has elapsed, running from the day after the simultaneous dispatch of the award decisions and letters to unsuccessful tenderers.

3.3.4 Evidence by contractor

The tenderer to whom the contract is to be awarded shall provide, within 15 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 2.4.2. 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.

3.3.5 No obligation to award the contract

The tendering procedure shall not involve the Contracting Authority 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

A fixed price direct service contract.

4.2 STARTING DATE OF THE CONTRACT AND DURATION OF THE TASKS

The contract shall commence on the day following signature by the last contracting party. The Contract is expected to be signed in **October 2011**. The duration of the contract shall not exceed **11 months**.

The execution of the tasks may not start before the contract has been signed. The period of execution of the tasks may be extended before the end of the period originally stated in the contract, but only with the written agreement of the contracting parties.

4.3 PLACE OF PERFORMANCE

The tasks will be performed on the Contractor's premises, EIGE's premises and other places indicated in the tender.

4.4 VOLUME OF THE CONTRACT

The maximum amount available for the contract is **450.000 EUR,** excluding VAT. Any bid exceeding this amount will not be considered.

4.5 TERMS OF PAYMENT

Payments shall be made in accordance with the Articles I.4 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 the first payment has not been executed as a result of default or negligence on the part of the Contractor.

4.6 GUARANTEES

No guarantees are required by the contract.

4.7 DATA PROTECTION

See Section I.8 in the Draft Service Contract and the Invitation to Tender.

4.8 ANNEXES

Annex 1

Relevant reference sites and documents

- EIGE's website, namely the reports and database available on the Beijing Indicators
- EU reports for the follow-up of the Beijing Declaration and Platform for Action
- EU's growth strategy for the coming decade (Europe 2020), with particular reference to the targets addressing gender equality[21]
- The priorities set within the European Commission strategy for equality between women and men 2010-2015[22]
- Swedish Presidency Report "Beijing+15" [23]
- Conclusions and reports of the Council of the EU according to the following list:

1999 - Women in political decision-making (FI)
Conclusions: http://register.consilium.europa.eu/pdf/en/99/st11/st11862.en99.pdf
Report: http://register.consilium.europa.eu/pdf/en/99/st11/st11829-re01.en99.pdf and corrigendum: http://register.consilium.europa.eu/pdf/en/99/st11/st11829-re01co01.en99.pdf

2000 - Women in the economy (reconciliation of work and family life) (PT, FR)
Conclusions: http://register.consilium.europa.eu/pdf/en/00/st13/st13481.en00.pdf
Report: http://register.consilium.europa.eu/pdf/en/00/st12/st12577.en00.pdf and corrigendum:
http://register.consilium.europa.eu/pdf/en/00/st12/st12577-co01.en00.pdf

2001 - Women in the economy (on equal pay) (SE, BE)
Conclusions: http://register.consilium.europa.eu/pdf/en/01/st14/st14485.en01.pdf
Report: http://register.consilium.europa.eu/pdf/en/01/st12/st12889.en01.pdf and annexes:
http://register.consilium.europa.eu/pdf/en/01/st14/st14485-ad01.en01.pdf and:
http://register.consilium.europa.eu/pdf/en/01/st14/st14485-ad01.en01.pdf

2002 - Violence against women (ES, DK)
Conclusions: http://register.consilium.europa.eu/pdf/en/02/st14/st14578.en02.pdf
Report: http://register.consilium.europa.eu/pdf/en/02/st08/st08875-re01.en02.pdf

2003 - Women and men in economic decision-making (EL, IT)
Conclusions: http://register.consilium.europa.eu/pdf/en/03/st15/st15205.en03.pdf
Report: http://register.consilium.europa.eu/pdf/en/03/st15/st15205-ad01.en03.pdf

2004 - Sexual harassment in the workplace (IE, NL)
Conclusions: http://register.consilium.europa.eu/pdf/en/04/st15/st15202.en04.pdf and Annex:
http://register.consilium.europa.eu/pdf/en/04/st15/st15202-ad01.en04.pdf

---

[21] http://ec.europa.eu/europe2020/index_en.htm
[22] http://ec.europa.eu/social/main.jsp?langId=en&catId=89&newsId=890&furtherNews=yes
[23] http://ec.europa.eu/social/BlobServlet?docId=4336&langId=en

Report: http://register.consilium.europa.eu/pdf/en/04/st09/st09832.en04.pdf and Annex:
http://register.consilium.europa.eu/pdf/en/04/st09/st09832-ad01.en04.pdf

2005- Beijing +10 review (LU)
Conclusions: http://register.consilium.europa.eu/pdf/en/05/st09/st09242.en05.pdf
Report: http://ec.europa.eu/social/BlobServlet?docId=3683&langId=en

2006 – Health (AT)
Conclusions: http://register.consilium.europa.eu/pdf/en/06/st09/st09468.en06.pdf
Report: http://register.consilium.europa.eu/pdf/en/06/st09/st09468-ad01.en06.pdf

2006 – Institutional mechanisms for women (FI)
Conclusions: http://register.consilium.europa.eu/pdf/en/06/st14/st14376.en06.pdf
Report: http://register.consilium.europa.eu/pdf/en/06/st14/st14376-ad01.en06.pdf and corrigendum: http://register.consilium.europa.eu/pdf/en/06/st14/st14376-ad01co01.en06.pdf

2007 – Education and training (DE)
Conclusions: http://register.consilium.europa.eu/pdf/en/07/st09/st09152.en07.pdf
Report: http://register.consilium.europa.eu/pdf/en/07/st09/st09152-ad01.en07.pdf

2007 – Women and Poverty (PT)
Conclusions: http://register.consilium.europa.eu/pdf/en/07/st13/st13947.en07.pdf
Report: http://register.consilium.europa.eu/pdf/en/07/st13/st13947-ad01.en07.pdf and corrigendum: http://register.consilium.europa.eu/pdf/en/07/st13/st13947-ad01co01.en07.pdf

2008 – Girl Child (SI)
Conclusions: http://register.consilium.europa.eu/pdf/en/08/st09/st09669.en08.pdf
Report: http://register.consilium.europa.eu/pdf/en/08/st09/st09669-ad01.en08.pdf

2008 – Review of Women in political decision-making (SI)
Conclusions: http://register.consilium.europa.eu/pdf/en/08/st09/st09670.en08.pdf
Report: http://register.consilium.europa.eu/pdf/en/08/st09/st09670-ad01.en08.pdf

2008 – Women and Armed conflicts (FR)
Conclusions:
http://www.consilium.europa.eu/ueDocs/cms_Data/docs/pressData/en/lsa/104821.pdf
Report: http://register.consilium.europa.eu/pdf/en/08/st16/st16596-ad01.en08.pdf and corrigendum: http://register.consilium.europa.eu/pdf/en/08/st16/st16596-ad01co01.en08.pdf
Annex of the report: http://register.consilium.europa.eu/pdf/en/08/st16/st16596-ad02.en08.pdf and corrigendum:
http://register.consilium.europa.eu/pdf/en/08/st16/st16596-ad02co01.en08.pdf

2008 – Review of reconciliation of work and family life (FR)
Conclusions: http://register.consilium.europa.eu/pdf/en/08/st17/st17474.en08.pdf
Report: http://register.consilium.europa.eu/pdf/en/08/st16/st16595-ad01.en08.pdf and

corrigendum: http://register.consilium.europa.eu/pdf/en/08/st16/st16595-ad01co01.en08.pdf

2009- Beijing +15 review (SE)
Conclusions: http://register.consilium.europa.eu/pdf/en/09/st15/st15992.en09.pdf

Report: http://register.consilium.europa.eu/pdf/en/09/st15/st15487-ad01.en09.pdf

Other references

EC(2006) , A Roadmap for equality between women and men, COM(2006) 92 final

EC (2008) , Advisory Committee on Equal Opportunities for Women and Men, 2008/590/EC

Council of European Union (2010), guidelines for the employment policies of the Member States, Part I and Part II of the Europe 2020 Integrated Guidelines, SEC(2010) 488

Council of European Union (2011), Council conclusions on the European Pact for gender equality for the period 2011 - 2020

Council of European Union(2000), Establishing a general framework for equal treatment in employment and occupation, COUNCIL DIRECTIVE 2000/78/EC

EC(1998), A Guide To Gender Impact Assessment, Publications of the European Communities, Luxembourg

EU, Treaty on the Functioning of the European Union

EU, Treaty on the European Union

EC(2010), Promoting equality: activities on fighting discrimination in 2009, Publication Office of the European Union, Luxembourg.

EC(2011), Report On The Progress On Equality Between Women And Men In 2010, SEC(2011) 193 final

EC(2010),Strategy for equality between women and men 2010-2015, COM(2010) 491 final

EC(2010), Actions to implement the Strategy for Equality between Women and Men 2010-2015, SEC(2010) 1079/2

EC(2010), On the strategy on equal opportunities for women and men within the European Commission (2010 – 2014), SEC(2010) 1554/3

EC(2010), *Background document Accompanying the Strategy for Equality between Women and Men 2010-2015, SEC(2010) 1080 final*

EC(2008), The fight against discrimination and the promotion of equality How to measure progress done, Office for Official Publications of the European Communities, 2008

EC(2010), A strengthened Commitment to Equality between Women and Men. A Women's Charter, COM(2010) final