



**EIGE/2013/OPER/10**

**TENDER SPECIFICATIONS**

EIGE's database on gender statistics

[OPEN PROCEDURE]

These Tender Specifications provide instructions and guidance to tenderers about the nature of the offer they should submit, and serve as the Contractor's mandate throughout the project implementation. The purpose of the Specifications is to ensure that the project is properly conceived by the Contractor, that the work is carried out on schedule and that resources will not be wasted.

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

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## 1 TECHNICAL SPECIFICATIONS

### 1.1 Contracting authority

Equality between women and men is a fundamental value of the European Union, enshrined in its Treaties<sup>1</sup> and in the Charter of Fundamental Rights of the European Union. Mainstreaming the principle of equality between women and men is a major part of all EU activities and represents the general approach to the implementation of all EU policies.

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. In addition, EIGE shall develop methods to improve the objectivity, comparability and reliability of data at European Union level by establishing criteria that will improve the consistency of information and take into account gender issues when collecting data<sup>2</sup>.

The study commissioned through this Invitation to Tender is undertaken within the scope of EIGE's Work Programme 2013. It is a part of EIGE's wider framework of activities aimed at providing a harmonised and centralised source of reliable and comparable data and statistics on gender equality.

#### b) General background

EIGE's founding Regulation states that the Institute should assist the Community institutions and the Member States in the collection, analysis and dissemination of objective, reliable and comparable information and data on equality between women and men. In particular, EIGE should carry out some of the tasks with which the existing institutions do not currently deal, specifically in the areas of coordination, centralisation and dissemination of research data and information.

The European Commission's Strategy for Equality between Women and Men 2010-2015, which provides the political context for the Institute's activities, defined as one of the key tasks for EIGE to set up a documentation centre accessible to the public with statistics, data, information, functioning models and approaches to gender mainstreaming.

According to EIGE's mid-term programme 2013-2015 and the Annual Work Programme 2013, the Institute is expected to establish a reliable source of information and data on gender equality in the European Union. To coordinate, centralise and disseminate research data and statistics on gender equality in Europe, the Institute aims to develop and provide to its

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<sup>1</sup> Articles 2 and 3(3) TEU and Article 8 TFEU.

<sup>2</sup> Article 3 of the Regulation (EC) No 1922/2006 of the European Parliament and of the Council of 20 December 2006 on establishing a European Institute for Gender Equality.

stakeholders EIGE's database on gender statistics – a centralised source of gender equality data and statistics. To ensure the sound quality of the database, it will primarily be based on reliable and comparable sex-disaggregated data on EU level.

In order to facilitate access to EIGE's stakeholders, researchers, journalists and the general public, the database should be disseminated through a user-friendly interface with an easily accessible search engine.

The development of the database needs to build upon the work on Statistical Information System undertaken by EIGE in 2012. This system was built in the format of a database on gender statistics, following the Eurostat's standard guidelines for presenting data and metadata. This database was used to develop the first Gender Equality Index at European Union level. Throughout 2013 and 2014, it needs to:

- be verified and updated;
- be expanded by integrating statistics data and metadata related to Beijing Indicators and other areas of work by EIGE;
- include links, hyperlinks and cross-references to ensure consistency with EIGE's available resources.

In order to contribute to the implementation of the above mentioned tasks, EIGE is launching this invitation to tender for a service contract with a professional service provider who can produce a database on gender statistics that follows an agreed structure and complies with standards of an agreed quality control plan.

## 1.2 Scope

### 1.2.1 EIGE's database on gender statistics

Since its establishment, EIGE has created an administrative structure that supports the agency in its vision of becoming the competence centre in the area of gender equality in Europe by collecting knowledge, sharing experience and hosting expertise on equality between women and men.

The Institute has set up the basic mechanisms to collect and provide unified and comparable data; to transfer this knowledge across Member States; and to establish an institutional memory of policy options, good practices, methods and tools.

Pursuing its goal of becoming a centralised source of reliable and comprehensive information on gender equality, EIGE has been working with several sources of quantitative and qualitative data within different projects. The results of this work must be organised and integrated into a consolidated database.

The database must integrate the following three main pillars, which are explained in greater detail below:

- Statistical Information System database on gender statistics;
- Database on the Beijing Platform for Action (BPfA) indicators database (publicly available as – 'Women and Men in the EU facts and figures')<sup>3</sup>;
- Dedicated section on data and information concerning gender-based violence.

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<sup>3</sup> <http://eige.europa.eu/content/women-and-men-in-the-eu-facts-and-figures>

The output of this contract is the production of a database that provides access to gender statistics data and metadata, follows an agreed structure and is based on Eurostat's standard guidelines for presenting data and metadata.

This statistics database should become a centralised resource for users to obtain statistics, data and metadata according to different search criteria within the perspective of EU policy areas on gender equality and identified keywords.

The database will:

- support better informed policy-making at EU and Member State levels;
- facilitate structured and user-friendly access to gender statistics information for users such as policymakers, civil servants, statisticians, research organisations, social partners, civil society organisations, media and, ultimately, European Union citizens.

It will also serve as a platform to review and update the EU-wide indicators of the BPfA.

The geographical coverage of the contract includes the 28 EU Member States. When available, the statistical data sources of international organisations and beneficiary countries from the Instrument for Pre-accession Assistance – IPA – shall also be considered<sup>4</sup>.

Part of the data to be included in the database is currently available in EIGE's Statistical Information System<sup>5</sup> and in the Beijing Indicators database<sup>6</sup> for the timeframe of 2005 onwards. These need to be integrated and expanded using reliable statistics data sources, such as from the following providers:

- Eurostat;
- Eurofound;
- European Union Agency for Fundamental Rights (FRA);
- DG Justice (European Commission's database on Women and Men in Decision Making);
- Other relevant agencies and DGs of the European Commission;
- European Migration Network;
- International Labour Organisation (ILO);
- Relevant agencies of the United Nations system (e.g., UNECE gender statistics database, UNODC, UNSD statistics databases);
- World Bank;
- Organisation for Economic Co-operation and Development (OECD);
- Organisation for Security and Co-operation in Europe (OSCE);
- Council of Europe (CoE);
- Other international and civil society organisations;

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<sup>4</sup> IPA beneficiary countries are identified by the European Commission DG Enlargement as: Albania, Bosnia and Herzegovina, the former Yugoslav Republic of Macedonia, Iceland, Kosovo\*, Montenegro, Serbia, and Turkey.  
[http://ec.europa.eu/enlargement/instruments/overview/index\\_en.htm](http://ec.europa.eu/enlargement/instruments/overview/index_en.htm)

<sup>5</sup> The Statistical Information System has been produced by EIGE through an external contract. It is internally available and access will be provided to the Contractor during the implementation of the project.

<sup>6</sup> Available at: <http://eige.europa.eu/content/women-and-men-in-the-eu-facts-and-figures>

- any other research and intergovernmental or supranational organisation working on statistics relevant from the gender perspective within the European Union Member States.

### 1.2.2 Development of EIGE's updated Statistical Information System

Aiming to create a Statistical Information System with gender statistics, in 2012, EIGE developed a database of gender statistics with data and exhaustive descriptions of its metadata. It included data related to indicators which are relevant from a gender perspective within the EU context and EU policy priorities. The metadata described conceptual information, methodology, harmonisation of data within the Member States and institutional references.

The construction of the Statistical Information System relied on data extracted from open sources following the EU's open data initiative from international organisations such as:

- Eurostat;
- UNECE;
- European Social Survey group;
- Eurobarometer;
- OECD;
- UNESCO;
- Eurofound;
- European Commission's database on Women and Men in Decision Making.

Data was gathered disaggregated for the fields of sex, reference year and the then-EU 27 Member States.

In parallel, using Eurostat's standards for organising metadata<sup>7</sup>, an extensive document was developed providing a comprehensive description and explanation of the data gathered according to the following criteria:

- data description: background, concepts and definitions;
- source and variable description;
- legal framework for implementing the statistical activity;
- institutional references;
- unit of measurement;
- geographical coverage;
- data collection frequency;
- quality assessment;
- potential quality improvement.

Both the database and metadata description files have been organised according to the structure of domains developed for the Gender Equality Index:

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<sup>7</sup> <http://epp.eurostat.ec.europa.eu/portal/page/portal/statistics/metadata>

- Work;
- Money;
- Knowledge;
- Time;
- Power;
- Health;
- Intersecting Inequalities;
- Violence.

For 2013, this database needs to be maintained, expanded and updated.

### 1.2.3 Database related to Beijing Platform for Action indicators

A database regrouping indicators related to the Beijing Platform for Action (BPfA) has been developed.

It presents background information and figures at EU27 level about gender equality in the context of the Beijing Platform for Action. This database has been developed within the framework of EIGE's support to the Presidencies of the European Council and support to policymakers, researchers and other interested persons. The database on BPfA indicators is published on EIGE's website as 'Women and men in the EU – facts and figures'<sup>8</sup>.

Information is organised at first by the following critical area of concern and then by indicator:

- Women and Poverty (A);
- Education and Training of Women (B);
- Women and Health (C);
- Violence Against Women (D);
- Women and Armed Conflict (E);
- Women and the Economy (F);
- Women in Power and Decision-making (G);
- Institutional Mechanisms for the Advancement of Women (H);
- Human Rights of Women (I);
- Women and the Media (J);
- Women and the Environment (K);
- The Girl Child (L).

Each area of concern is structured according to the following items:

- Description;
- Objectives;
- Overview about developing, adopting and reviewing the indicators;

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<sup>8</sup> <http://eige.europa.eu/content/women-and-men-in-the-eu-facts-and-figures>

- List of developed indicators;
- Resources

The information provided by indicator is organised as follows:

- Data tables;
- Concept of indicator and calculation rules;
- Data source;
- Reference to the original source of the developed indicator;
- Additional comments

#### 1.2.4 Data and information on gender-based violence

Combating gender-based violence (GBV) is a priority policy in the EU and needs to be supported by solid data and information. The European Commission's Strategy for Equality between Women and Men 2010-2015<sup>9</sup> stresses that 'there are many forms of violence that women experience because they are women. These include domestic violence, sexual harassment, rape, sexual violence during conflict and harmful customary or traditional practices such as female genital mutilation, forced marriages and honour crimes. It is estimated that in Europe, 20 % to 25 % of women have suffered physical violence at least once during their lives<sup>10</sup> and there are estimates that up to half a million women living in Europe have been subjected to genital mutilation'<sup>11</sup>.

GBV occurs on a worldwide scale, blighting the lives of victims, their families, communities and society at large. The search for solutions continues to be hampered by a lack of comparable and robust data that decision-makers need to shape informed, targeted policies. The need to develop comparable and reliable statistics on GBV has long been recognised by the European Commission and the EU. This has been further emphasised by the Council of the European Union<sup>12</sup> which highlighted the problem of the persistent lack of comparable data, as have various civil society organisations and researchers.

Some data exist; however, they are insufficient to offer a global picture of the prevalence of the different types of GBV at EU level as it covers few Member States and, even then, only partially.

To overcome the existing data gaps, several initiatives, such as the survey on gender-based violence against women by the European Union Agency for Fundamental Rights, have been carried out. National Statistics Offices and other national data collectors in the EU Member States have also developed surveys and registration systems in order to gather statistical information at national level.

In the absence of harmonised and comparable data on the prevalence of GBV, other sources of information and data sets could be used to estimate the level of GBV in EU Member States, namely the use of administrative sources of data or records, such as crime statistics registers, hospitals, police cases, shelters and/or victims' support centres. Data from these records could act as initial proxy indicators of prevalence and incidence at both regional and

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<sup>9</sup> [http://europa.eu/legislation\\_summaries/employment\\_and\\_social\\_policy/equality\\_between\\_men\\_and\\_women/em0037\\_en.htm](http://europa.eu/legislation_summaries/employment_and_social_policy/equality_between_men_and_women/em0037_en.htm)

<sup>10</sup> Council of Europe, Combating violence against women: Stocktaking study on the measures and actions taken in Council of Europe member states (2006).

<sup>11</sup> EP resolution of 24.3.2009 on combating FGM in the EU.

<sup>12</sup> Council Conclusions on the Eradication of Violence Against Women in the European Union (8 March 2010) [http://www.consilium.europa.eu/uedocs/cms\\_Data/docs/pressdata/en/lssa/113226.pdf](http://www.consilium.europa.eu/uedocs/cms_Data/docs/pressdata/en/lssa/113226.pdf)

national levels. However, many of these records are not systematically used, the existing data may not be collated centrally, data collection may not be obligatory and access to data from such records is often restricted.

The existence of statistical gaps in measuring GBV is important evidence in supporting the European Parliament's resolution on priorities and the outline of a recent EU policy framework to fight violence against women. It calls on the European Commission to develop and provide annual statistics on violence against women. This resolution also calls on Member States to show clearly in their national statistics the magnitude of violence against women, including its gender-based nature, and to take steps to ensure that data is collected on the sex of the victims, the sex of the perpetrators, their relationship, age, crime scene and injuries (2010/2209(INI))<sup>13</sup>. The Council in its Conclusions of December 2012 (17444/12)<sup>14</sup> also calls to improve the collection and dissemination of comparable, reliable and regularly updated data on victims and perpetrators of all forms of violence against women at both national and EU level.

EIGE's recent work on GBV data collection identified that among the EU 28 Member States, there are no ongoing, systematic, representative surveys that use a harmonised approach to gather data on GBV prevalence.

The lack of comparable data is also caused by the lack of common definitions of prevalence of the different types of GBV, the use of different methodologies, definitions and approaches, as well as a wide variation in the use of information sources to collect data and to estimate the extent of GBV at national and/or international level.

Looking to fill in the gap of information and addressing the urgent need to collect reliable and comparable data on GBV at EU level, the Institute began collecting and processing a broad range of information on the actors engaged in the prevention of domestic violence, good practices in anti-violence awareness-raising campaigns and methods for victims' support in the Member States.

A number of reports have been developed in this area. Notably, EIGE has collected information on policies, legal documents, methods, tools and good practices within the 28 EU Member States on combating female genital mutilation (FGM); submitted the report on 'Violence against Women – Victim Support' to the Cypriot presidency; and delivered a full set of comparable and reliable data on support services for female victims of violence in Member States.

Currently the Institute is also finalising a study on mapping the status and potential of administrative sources of data on GBV in the EU and the level of harmonisation of administrative registers on GBV within international organisations.

Taking into consideration EIGE's work on this domain, the overall lack of harmonised, comparable and reliable statistics – coupled with the increasing interest shown by the European Commission and Member States for EIGE's work in this area – illustrates that a dedicated section on data and information on GBV should be included in the database.

### 1.3 Objectives

The objective of this project is to **produce a statistics database with data and metadata on gender statistics** through updating, expanding and integrating the existing statistical datasets

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<sup>13</sup> <http://www.europarl.europa.eu/oeil/popups/ficheprocedure.do?id=587248>

<sup>14</sup> [http://ec.europa.eu/justice/gender-equality/files/statistics\\_indicators/2012-12-06\\_council\\_conclusions\\_violence\\_en.pdf](http://ec.europa.eu/justice/gender-equality/files/statistics_indicators/2012-12-06_council_conclusions_violence_en.pdf)

on gender equality produced by EIGE into a centralised source of information to be incorporated and made available at EIGE's online resource and documentation centre.

The database should be a harmonised and centralised source of reliable and comparable data and statistics on gender equality available at EIGE's online resource and documentation centre with data extracted from international sources. It should address users' needs on gender statistics by allowing easy access and data extraction according to different criteria.

### Specific objectives

- 1. Map and describe the organisation/structure of existing datasets already produced by EIGE.**
- 2. Propose a structure for merging EIGE's existing databases,** taking into account that the information to be included into the final database is:
  - a. consistent and easily accessible to common users;
  - b. linked by hyperlinks and/or cross-references, when possible, to relevant resources publicly available on EIGE's website.
- 3. Assess, verify and adjust data and information collected by EIGE** to match the statistical data quality criteria defined by the European Statistical System and applied by Eurostat<sup>15</sup>.
- 4. Produce an overview of the sources of information and data to be used for the update and extension of the database.**
- 5. Update and complete information already gathered by EIGE in the form of data and metadata on gender statistics.** The updates should be made for the 28 EU Member States and IPA countries when available. Information must be adjusted to match the standard criteria defined by the European Statistical System and applied by Eurostat<sup>16</sup>.
- 6. Produce an updated and comprehensive database on gender statistics with a users' guide/manual.** The database should comply with different functionalities meeting the users' interest, allowing the possibility to extract and obtain data and metadata according to different search criteria, including but not limited to:
  - a. EU policy areas on gender equality and identified key words;
  - b. the domains of the gender equality index;
  - c. the critical areas of the Beijing Platform for Action;
  - d. gender-based violence.

## 1.4 Activities

### Activity 1

**Mapping, description and assessment of the organisation/structure of existing statistical datasets produced by EIGE within the framework of EIGE's working areas such as the Gender Equality Index, the BPfA and GBV.**

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<sup>15</sup> [http://epp.eurostat.ec.europa.eu/portal/page/portal/social\\_protection/quality](http://epp.eurostat.ec.europa.eu/portal/page/portal/social_protection/quality)

<sup>16</sup> [http://epp.eurostat.ec.europa.eu/portal/page/portal/social\\_protection/quality](http://epp.eurostat.ec.europa.eu/portal/page/portal/social_protection/quality)

This activity covers the review and analysis of quantitative and qualitative information gathered by EIGE within its working areas. The information is partially available on EIGE's website<sup>17</sup> and will be made available to Contractors through internal documentation and materials.

Under this activity, the following specific tasks should be performed:

- Review and analysis of the information (data and metadata; quantitative and qualitative information) and materials produced by EIGE (public and internal).
- Description, verification and assessment of the information and materials reviewed, following the statistical data and metadata quality criteria applied by Eurostat<sup>18</sup> (as described under objective 2).
- Development of technical sheets with a comprehensive mapping and report on the information and materials revised.

The completion of this activity requires EIGE's guidance and accessibility of the Contractor to internal resources, taking into account that a considerable amount of the materials which need to be reviewed, such as the Statistical Information System, are still internal and not publicly available. Therefore, it is fundamental to establish, on a daily basis, regular communication between the Contractor and EIGE's different teams.

Consequently, the Contractor should make available the support of one researcher for 20 person/days to work within EIGE's premises at an initial stage of the contract. The profile of the researcher corresponds to the description under 1.9 for '1 researcher in quantitative data analysis'.

## Activity 2

### **Proposal for creating a common database platform for EIGE's database on gender statistics.**

On the basis of the previous activity, this stage of the project involves classification of the information and materials reviewed and analysed. The following specific tasks must be implemented:

- Development of a proposal, to be discussed and agreed upon with EIGE, for creating a common database allowing easy access for extraction of data targeting different users and interests. The proposal should reflect a tree structure having Eurostat's public database as a benchmark<sup>19</sup>, with a similar search engine. It should contain and allow users' search on the basis of the three main pillars previously mentioned:
  - Statistical Information System developed on gender statistics;
  - BPfA indicators database;
  - gender-based violence.

The completion of this activity requires regular discussions with EIGE's team and feedback on a daily basis in order to ensure coherence and consistency of the information to be delivered. Therefore, it is fundamental to establish, on a daily basis, regular communication between the Contractors and EIGE's different teams.

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<sup>17</sup> <http://eige.europa.eu/>

<sup>18</sup> <http://epp.eurostat.ec.europa.eu/portal/page/portal/statistics/metadata>;

[http://epp.eurostat.ec.europa.eu/portal/page/portal/social\\_protection/quality](http://epp.eurostat.ec.europa.eu/portal/page/portal/social_protection/quality)

<sup>19</sup> [http://epp.eurostat.ec.europa.eu/portal/page/portal/statistics/search\\_database](http://epp.eurostat.ec.europa.eu/portal/page/portal/statistics/search_database)

Consequently, the Contractor should make available the support of one researcher for 25 person/days to work within EIGE's premises at this stage of the contract. The profile of the researcher corresponds to the description under 1.9 for '1 researcher in quantitative data analysis'.

### Activity 3

#### **Production of an overview of the sources of information, data and metadata, to be used for the update and extension of the database.**

This activity should be built on the basis of the data sources already identified by EIGE. It covers the identification of reliable official data sources at international level providing the availability of gender sensitive indicators.

The specific tasks are as follows:

- analysis of the information and materials gathered according to the statistical data quality criteria defined by the European Statistical System and applied by Eurostat<sup>20</sup>;
- identification and mapping of reliable official sources to be used for the update and extension of the database;
- development of a proposal for international sources for extracting data to be used;
- report and mapping on methodology and quality issues for the selected sources complying with the European Statistics Code of Practice<sup>21</sup>.

### Activity 4

#### **Extraction of relevant gender statistics data and metadata from international data sources.**

This activity involves the identification and extraction of available gender sensitive data from national and international sources. It will include the following tasks:

- Ensure the extraction of data from international organisations' websites (including but not limited to UN, Eurostat, Eurofound, OECD), where possible using automatised procedures that can allow for updates in the future.
- Record of a logfile<sup>22</sup> with the list of events which occurred since the initial implementation of the project. In particular, it should include the automatisation of links for the extraction of data from the used data sources.
- Verify if the data, as well as their metadata methodologies, are available from different international sources and propose the source to be used based on methodology and quality issues.

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<sup>20</sup> [http://epp.eurostat.ec.europa.eu/portal/page/portal/social\\_protection/quality](http://epp.eurostat.ec.europa.eu/portal/page/portal/social_protection/quality)

<sup>21</sup> [http://epp.eurostat.ec.europa.eu/portal/page/portal/quality/code\\_of\\_practice](http://epp.eurostat.ec.europa.eu/portal/page/portal/quality/code_of_practice)

<sup>22</sup> A log file is a file that contains a list of events which have been 'logged' by a computer/application or process. Log files can be used for analysing programme crashes or errors. It may also record any input and output used during the process. It must include the date and time of every recorded event. The log file may also keep track of what resources were used. This data can be processed by website statistics software, which can display the information in a user-friendly format. Most log files have a '.log' file extension, but many use the standard '.txt' extension or another proprietary extension instead (<http://www.techterms.com/definition/logfile>).

## Activity 5

### **Production of a statistics database according to an approved structure by EIGE, following the European Commission's initiative on Open Data and complying with EIGE's standards in its quality control plan.**

This activity covers the development of EIGE's statistics database on gender statistics by integrating the selected data and metadata following the application of basic and advanced quality controls to these data and metadata. Statistics data and metadata should be made available to the public in the format of an open source, following the European Commission's initiative on Open Data<sup>23</sup>.

The following tasks should be performed for the completion of this activity:

- Extraction of data: from the selected sources, complying with the European Statistics Code of Practice for the 28 EU Member States and IPA countries when available.
- Validation of data: performing controls in order to ensure consistency between the original source and the database, through an automatic routine. Addition of information should be considered when necessary using flags, footnotes, methodological notes and/or other relevant solutions. The validation concerns the appropriate naming of the dataflow and the syntax/format of the datasets per record/entry.
- Storage of the data in a production database: to store a central database mainly for reliability and integration into EIGE's website and its resource and documentation center.
- Advanced reporting and analysis of environments: to make regular or ad-hoc reports and/or to analyse the data to be able to pinpoint significant cases or to detect errors. Data is validated using reference information from other sources or other years. Reporting tools and procedures need to be created and/or improved to take into account changes in the indicators, to consider new variables and new countries. Validation rules need to be adapted in consequence.
- Provision of hyperlinks and cross-references: where appropriate, the database should provide hyperlinks and cross-references to all the materials and resources made available by EIGE, as well as to other external organisations. Consistency and coherence should be ensured regarding all references provided.

The competences required for the completion of this activity are not available in house and need to be crossed with the technical requirements of EIGE's database on gender statistics. At this stage, the constant feedback between EIGE's team and the researcher responsible for the development of the database should be ensured.

Therefore, the Contractor should make available the support of one researcher for 45 person/days to work within EIGE's premises at this stage of the contract. The profile of the researcher corresponds to the description under 1.9 for '1 statistician databases solutions'.

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<sup>23</sup> <https://ec.europa.eu/digital-agenda/node/70>: <http://open-data.europa.eu/en/linked-data>

## 1.5 Deliverables

The Contractor should work closely with EIGE through a regular exchange of information through telephone, email, production of required outputs and meetings.

1. An inception report summarising the discussion of the inception meeting at least 6 pages (Week 3).
2. An interim report-1 with the first findings of the revision and analysis of quantitative and qualitative information gathered by EIGE within the framework of its working areas. This includes the production of technical sheets describing existing EIGE's datasets and materials revised (Week 7).
3. An interim report-2 with a proposal for a structure merging and linking all the information mapped and the one to be extracted/proposal of a factsheet on EIGE's database on gender statistics (Week 14).
4. An interim report-3 with the mapping of reliable official sources to be used for the update and extension of the database and the methodology and quality issues for the selected sources (Week 20).
5. Updated database and its log file with further update of the references, links and hyperlinks included in the database and metadata explanatory notes in order to include data, metadata and validation rules (Week 24).
6. A final report covering all the items described under the specific objectives 1, 2, 3, 4 and 5, together with necessary statistical annexes and a manual/users' guide of the database. This report shall have a minimum of 60 pages including all annexes and bibliographical references; statistical annexes, documenting the report, will be provided separately (Week 44).
7. A summary report of no more than 10 pages explaining the main findings understandable for non-specialised readers (Week 46).

### **Deliverable 1: Inception report and inception meeting**

Within two weeks of signing the contract, EIGE will organise an inception meeting 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 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 inception report which is to be submitted to EIGE for approval within 10 days after the first meeting. The inception 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.

Presentation of the results of the initial analysis shall include:

- the main findings of the preparatory work undertaken;
- a description of the methodology to be used and the problems encountered;

- data to be extracted from different sources, covering all 28 Member States and IPA countries when available;
- a proposed structure for the interim report, final report, summary report and factsheet;
- an updated work-plan ensuring the submission of the deliverables within the contractual deadline.

Size: minimum 6 pages

Language: English

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

### **Deliverable 2: Interim report-1 and interim meeting 1**

**The interim report-1**, 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:

- description of the information and materials assessed and verified;
- technical sheets with a comprehensive mapping of the information and materials revised.

Size: minimum 30 pages

Language: English

Deadline: Seven weeks after the date of signature of the contract, the Contractor should provide the Interim report-1 to EIGE and 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 five 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 interim report-2 shall include the following:

- proposal for creating a common database allowing easy access to users for extraction of data according to different interests and criteria;
- description and justification of the criteria used for the proposed organisation of the data and metadata to be made publicly available;
- proposal of a factsheet highlighting the key features of the database in the two pages of information (the Tenderer is expected to propose tentative structure for the factsheet in the technical proposal). The final content of the factsheet will be agreed upon with EIGE during the implementation of the project. The Contractor shall be responsible for developing the text, editing, proof-reading and laying out the factsheet, in line with EIGE's visual style guide<sup>24</sup>

Size: minimum 30 pages

Language: English

Deadline: Fourteen weeks after the date of signature of the contract, the Contractor is expected to provide the interim report-2 with the proposal of a factsheet on the main features of the database 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.

#### **Deliverable 4: Interim report-3**

The interim report-3 shall include:

- proposal with the list of reliable official sources to be used for the update and extension of the database;
- description of methodology and quality issues for the selected sources.

Size: minimum 30 pages

Language: English

Deadline: Twenty weeks after the date of signature of the contract, the Contractor is expected to provide the interim report-3 to EIGE. 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 database.

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<sup>24</sup> <http://www.eige.europa.eu/sites/default/files/documents/eige-style-guide.pdf>

**Deliverable 5: Updated database and log file**

The complete database with updated references, links, hyperlinks and its log file as described under activity 4 should be released by using the most appropriate software the Tenderer and EIGE will agree.

Language: English

Deadline: Twenty-four 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 6: Final report**

The final detailed analytical report should be in line with the methodology proposed and agreed upon during the inception meeting. 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 final report shall include a users' manual/guide on the main functionalities for search of information and extraction of data.

The report, with corresponding annexes, should be provided in four hard copies and in an electronic copy.

The final report shall include the following:

- description of methods on quality assessment applied during the implementation of the project, namely what regards the consistency of the final database;
- detailed description on how the project responded to the objectives of the terms of references;
- short report on the activities implemented during the 90 days;
- identification of the methodology implemented and the problems encountered;
- description of all the references and sources reviewed or consulted during the project.

Size: minimum 60 pages and relevant annexes

Language: English

Deadline: Forty-four 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

The summary report will outline the main findings in a concise format and will be developed for wider dissemination. It should present a clear and explicit overview of the work implemented and the main findings.

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.

All the deliverables must be submitted in high-quality English (UK).

The reports must be written in a clear and simple way, providing information and analysis that can be understood by non-specialists. The reports must be in MS Word and PDF format. The format of annexes might vary depending on the type of information presented.

For the preparation of the deliverable, EIGE's guidelines on abbreviations, ordering of countries, referencing, text layout, editing, etc., must be taken into account. The guidelines will be provided to the Contractor at the inception meeting.

The final versions of all deliverables must be professionally edited<sup>25</sup> and proofread<sup>26</sup>, 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).

All deliverables must be revised by the Contractor according to EIGE's recommendations, when necessary, and returned within the deadline mentioned in the contract. When necessary,

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25 Copy editing. Specifically, these tasks include:

- Assessing the quality of the text (for completeness, accuracy, relevance and coherence)
- Editing/rewriting in clear and appropriate English (the originals at times originate from either one or several authors, including both EIGE's staff and external researchers, with varying linguistic backgrounds)
- Resolving queries with the authors and EIGE's editorial team
- Identifying and inserting appropriate references/hypertext links
- Giving feedback about templates, guidelines and workflow procedures
- Ensuring overall transition from a non-native text to a native English text

26 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](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

activities aimed at producing deliverables 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 expected from any third party.

All the reports, with corresponding annexes, must be provided in three hard copies and in an electronic copy, with the exception of the final deliverables (detailed analytical final report, executive summary and abstract), which must be provided in four hard copies and in an electronic copy.

The overall provisional timeline is the following:

Deliverable 1: Initiation meeting and report	W2
Deliverable 2: Interim report-1/interim meeting	W7
Deliverable 3: Interim report-2/interim meeting	W14
Deliverable 4: Interim report-3/interim meeting	W20
Deliverable 5: Complete database and its log file	W24
Deliverable 6: Final report	W44
Deliverable 7: Summary report	W46

A detailed timeline should be provided in the offer.

## 1.6 Methodology

The methodological framework shall be developed by the Tenderer and shall provide a sound approach within the scope and time defined in these Technical Specifications. The tenderer shall propose a methodology which would ensure the achievement of the defined objectives and the collection of reliable information and data. The tenderer shall clearly indicate how the information (literature, documents, etc.) and data will be identified, extracted and processed, and how the providers of data and information will be reached.

Identification and access to various datasets should be ensured within a methodological structure.

The implementation of the project should follow a quality assurance of the deliverables and quality control process. In the offer, bidders must justify their quality assurance and quality control plan for completion of deadlines and contingency measures to mitigate risks. The following criteria should be addressed:

- Description of methodology. The Contractor should propose a sound methodology which would ensure the achievement of the defined objectives and the collection of reliable information and data. The methodology tender should specify, among other things:
  - Quality assurance: The Contractor should define and follow a process that will ensure that execution of tasks meet the requirements of EIGE and will be performed without defects and/or errors.

- Quality control: The Contractor should define and follow a process that will check if the deliverables meet EIGE's requirements and are flawless. This process should also define the mitigation actions in case the quality control reveals errors in the deliverables.

## **1.7 Communication and reporting**

The Contractor should work closely with EIGE through a regular exchange of information.

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 personal 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. During the meetings information on the implementation, quality control will be agreed and exchanged.

## **1.8 Responsibility**

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

## **1.9 Project Team**

The organisation of the project team is a key feature and it is fundamental in order to deliver the expected results, in the defined timeline.

The required experience of the team members should be explicitly reflected in their CVs, which are to be included in the Tenderer's offer (as referred in section 2.4.3.B of the Tender Specifications). Tenderers should pay attention to the need to ensure that the research team fulfils the requirements listed below in terms of qualifications and experience.

The team must have members with the following professional profiles and may include further members if needed.

The team must include:

### 1 project manager

Qualifications and professional experience must include:

- university degree;
- minimum of five years of professional experience in project management;
- proven experience in research management, as manager or coordinator of a least three major international or European projects (preferably research), each involving at least three countries;

- preferable experience on evaluation and assessment of projects, programmes and practices in the context of gender equality;
- excellent knowledge of English (Level C1 based on Europass CV model).

#### 1 researcher in quantitative data analysis

Qualifications and professional experience must include:

- university degree in social sciences or related field;
- proven experience in international or European research projects;
- minimum of five years of research experience in quantitative data analysis (preferably with links to gender statistics);
- excellent knowledge of English (Level C1 based on Europass CV model).

#### 1 researcher in gender equality

Qualifications and professional experience must include:

- university degree in social sciences;
- proven experience in international or European research projects;
- minimum of five years of research experience in gender equality issues;
- excellent knowledge of English (Level C1 based on Europass CV model).

#### 1 statistician in social statistics

Qualifications and professional experience must include:

- university degree in statistics, mathematics or related field with a significant quantitative analysis component;
- proven experience in international or European research projects;
- minimum of five years of experience in data analysis in social statistics, preferably linked with gender equality issues;
- experience in working with microdata and use of statistical software;
- excellent knowledge of English (Level C1 based on Europass CV model).

#### 1 statistician in databases solutions

Qualifications and professional experience must include:

- university degree in statistics, mathematics or related field with a significant quantitative analysis component;
- proven experience in international or European research projects;
- minimum of five years of experience on designing databases solutions;
- experience in work with microdata and use of statistical software;
- excellent knowledge of English (Level C1 based on Europass CV model).

#### 1 database expert

Qualifications and professional experience must include:

- university degree in IT sciences with a specific focus in databases;
- minimum of five years of experience on analysing, designing and implementing relational databases;
- sufficient knowledge of English (Level B2 based on Europass CV model).

1 editor

## Qualifications and professional experience

- university degree;
- proven experience in international or European research projects;
- minimum of five years of experience in editing and proofreading;
- excellent knowledge of English (Level C1 based on Europass CV model).

The team working on the project must possess strong analytical and drafting capacities and have a very good knowledge of the English language. Knowledge of English shall be minimum Level C1 based on Common European Framework of Reference (CEF).

The project manager is in charge of the coordination and administrative tasks of the project, as well as being responsible for contacting and informing EIGE about all aspects related to the execution of the contract. The project manager shall provide EIGE with frequent updates on the progress of the study and other relevant aspects of the work. 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 researchers should be considered.

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

**1.10 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.

**1.11 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 EIGE's database on gender statistics; 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
Reports	<ul style="list-style-type: none"> <li>- clarity of presentation of the reports</li> <li>- respect of deadlines</li> </ul>

Description of the information mapped	<ul style="list-style-type: none"> <li>- quality and clarity of the analysis: relevance and accuracy of the information</li> <li>- practicality of the output delivered: usefulness and level of detail</li> <li>- readability of the output delivered: ease of reading, specifically short, clean sentences, active voice, accessible and coherent vocabulary throughout the text – taking into account that the readers could be English native speakers and non-English native speakers</li> <li>- respect of deadlines</li> </ul>
Design of the database	<ul style="list-style-type: none"> <li>- accessibility of the database: a user-friendly output, including quality, accuracy and clarity</li> <li>- proper functioning of the interactive outputs: the smallest amount possible of broken hyperlinks and other bugs</li> <li>- full compliance with the criteria requested to the structure of the database</li> <li>- respect of deadlines</li> </ul>
Availability of an ‘intra muros’ researcher for the period of 90 working days	<ul style="list-style-type: none"> <li>- sense of responsibility</li> <li>- level of effectiveness (speed of delivery, taking into account possible linguistic limitations)</li> <li>- completeness, coherence and technical quality of the work developed</li> <li>- punctuality</li> <li>- respect of deadlines</li> </ul>

## 2 THE TENDER

### 2.1 Submission of the tender

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

Being launched by an EU Agency, this procurement procedure is not opened to the countries belonging to the Government Procurement Agreement (GPA), except those mentioned in the previous paragraph.

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 6 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 invalid the tender in question.

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, which 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 Opening of tenders

Tenders will be opened on

24/09/2013 at 10:30 EET (Vilnius time)

at the following location:

European Institute for Gender Equality
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Gedimino pr. 16  
01103 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 two working days in advance to the following e-mail address: [procurement@eige.europa.eu](mailto:procurement@eige.europa.eu). The reference number of the procurement procedure should be clearly indicated.

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 EIGE**

In principle, no contact is permitted between the contracting authority and the Tenderer during the tendering procedure. However, contacts may exceptionally be permitted – these cases are specified in the Letter of Invitation.

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](mailto: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 website, Internet address <http://www.eige.europa.eu/content/procurement>. 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.

EIGE 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://www.eige.europa.eu/content/procurement>.

During assessment procedure, EIGE 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, 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 must be clear and concise, with continuous page numbering, and assembled in coherent fashion (e.g., bound or stapled).

Tenders shall be submitted in an official EU language, if possible in English, the working language of EIGE.

All tenders must include:

A. Cover 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 Offer addressing Technical Specifications and award
- Section Five: Financial offer

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](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](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, filled-in and duly signed powers of attorney of the Standard Submission Forms, depending on the setup 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.

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 its obligations to EIGE and shall bear exclusive liability, sole and full 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 the 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 the methodology which parts of the work will be subcontracted.

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

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

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

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

### **2.4.2 Section Two: Exclusion criteria documentation**

A. Tenderers (including consortium members in case of a joint offer) 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 106 and 107 of the Financial Regulation and detailed in the SSF;
- undertake to submit to EIGE any additional documents relating to the exclusion criteria that EIGE considers necessary to perform its checks within seven calendar days following the receipt of EIGE'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 106 and 107 of the Financial Regulation after they have been given the opportunity to present their observations.
- These penalties are detailed in Article 109 of the Financial Regulation and Articles 142 and 145 of the Rules of Application (No 1268/2012 of 29 October 2012).

B. The tenderer to whom the contract is awarded shall provide, within 10 days following the dispatch of the letter informing it 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:

- For situations described in (a), (b) and (e), production of a recent extract from the judicial record is required or, failing that, a recent equivalent document issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied. Where the Tenderer is a legal person and the national legislation of the country in which the Tenderer is established does not allow the provision of such documents for legal persons, the documents should be provided for natural persons, such as the company directors or any person with powers of representation, decision-making or control in relation to the Tenderer.

- For the situation described in point (d) above, recent certificates or letters issued by the competent authorities of the State concerned are required. These documents must provide evidence covering all taxes and social security contributions for which the Tenderer is liable, including, for example, VAT, income tax (natural persons only), company tax (legal persons only) and social security contributions.

- For any of the situations (a), (b), (d) or (e), where any document described in two paragraphs above is not issued in the country concerned, it may be replaced by a sworn or, failing that, a solemn statement made by the interested party before a judicial or administrative authority, a notary or a qualified professional body in his country of origin or provenance.

If the Tenderer is a legal person, information on the natural persons with power of representation, decision-making or control over the legal person shall be provided only upon request by EIGE.

Where it has 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 its honour that the documentary evidence has already been provided to EIGE in a previous procurement procedure and confirm that no changes in its situation have occurred. The Tenderer shall indicate in its tender all the references necessary to allow the EIGE 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. 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 of subcontracting to the same subcontractor 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.

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 comply with 2.4.3.A and 2.4.3.B. In such a case, the Tenderer shall declare on its honour that the documentary evidence has already been provided to EIGE in a previous procurement procedure and confirm that no changes in its situation have occurred. The tenderer shall indicate in its tender all the references necessary to allow the EIGE services to check this evidence.

#### **2.4.3.A 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.

Evidence of 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 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:

- It should be presented in original and certified by means of a signature of the chief accounting officer of the tendering organisation.
- 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.
- In the case of a consortium submitting an offer, the consortium may rely on the capacities of members of the consortium. It must prove in its offer that it will have their resources at its disposal.
- The statements of Economic and financial capacity should be included in the offer for all consortium partners.
- In the case of a physical person the financial statement should be included into the offer for where only two lines on Turnover need to be filled in and the financial statement can be signed by the physical person only.

#### 2.4.3.B 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 and reliability in providing the required expertise.

The Tenderer needs to demonstrate in the Offer the capacity to:

- set up the appropriate organisational structure to carry out all the tasks under this contract;
- manage the administrative and financial aspects of such a contract;
- liaise with the relevant actors on EU and Member States' level;
- 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 28 Member States. EIGE will assess this criterion, inter alia, on the basis of a list of organisations on which the Contractor can rely for the countries concerned by the contract and an organisational chart explaining the structure to be put in place;
- 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 relation to gender equality;
- development and use of statistics and data at national and European levels;
- assessment of data quality, measurability, comparability and interpretation of data;

- design of databases;
- European Union policies and strategies on gender equality;
- synthesis and analysis of large amounts of information;
- drafting and editing reports;
- 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.

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.

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>.

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.

#### **2.4.4 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 tenderer must submit its Technical Offer following the structure described below:

#### ***Demonstration of 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 timeline***

Technical Offer has to describe clearly:

- a) knowledge about the issues related to the objectives of the study, at EU and national levels;
- b) the methodological approach developed to achieve the expected results which should ensure the achievement of the defined objectives and the collection of reliable information and data;
- c) the strategy to deliver expected results, aiming to provide relevant, coherent, accountable information and develop qualitative analysis and recommendations, consistent with EIGE's mission to support and promote gender equality in EU Member States;
- d) the operational structures provided to implement the activities and to fulfil the foreseen tasks, with particular concern on project management, risk assessment, coordination of expertise required and the strategy to manage different activities in the given timeline;
- e) the planning and the description of how and when activities will be implemented and deliverables provided;
- f) the strategy adopted to **ensure quality, relevance and consistency** of the expected results, with specific concern for the assessment of the qualitative dimension of the scientific and methodological contribution to be achieved by the study;
- g) the strategy and measures adopted to **guarantee quality and consistency** of the deliverables, including language, editing, proofreading and copy editing.

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 (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.

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.

**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 offer

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

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

The maximum volume of the contract is estimated at **EUR 360 000**, 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 shall include direct costs such as travel costs, translation expenses, any expenses for meetings' facilities or other. 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 (non-)exclusion of the Tenderer will be evaluated on the basis of the documents submitted as indicated in Section 2.4.2 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 2.4.2 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.

#### 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 admissibility 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.
- For the overall turnover or turnover, a consolidated assessment shall be made.
- 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 Offers will be evaluated according to the following technical award criteria:

Criteria number	Criteria description	Maximum points per criteria	Minimum required score
1	<u>Project management:</u>	<u>40</u>	20
	- Understanding of the objectives of the contract	15	
	- Work plan	15	
	- Composition of the project team	10	
2	<u>Project methodology and tools:</u>	<u>50</u>	25
	- Clear and appropriate methodological approach, including sound methodology, quality assurance and quality control plan	25	
	- Level of detail and clarity of the offer	10	
	- Strategy to deliver the expected results	15	
3	<u>Data protection and copyright</u>	<u>10</u>	5
Total		100	

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

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

## B. Financial evaluation

The evaluation of Financial Offers is based on the 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/price ratio, in accordance with the following formula:

$$\text{Final score for Tender} = \text{Technical score} \times 100\,000 / \text{Price}$$

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.

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

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

Upon respective written requests made by the Tenderers, EIGE will inform all rejected tenderers of the reasons for their rejection and all tenderers who submitted 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 contract with the successful tenderer until a standstill period of 14 calendar days has elapsed, running from the day after the simultaneous electronic 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 it 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 proves 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 it provides the evidence on exclusion.

### 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

Fixed price service contract.

### 4.2 Starting date of the contract and duration of the tasks

The contract shall commence on the day following signature by EIGE as the last contracting party. The contract is expected to be signed in 16 October 2013. The duration of the tasks shall not exceed 10 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 or places indicated in the tender. Meetings between the Contractor and EIGE will be held on EIGE premises in Vilnius.

### 4.4 Volume of the contract

The maximum amount available for the contract is **EUR 360 000, excluding VAT**. Any bid exceeding this amount will not be considered.

### 4.5 Terms of payment

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

### 4.6 Guarantees

No guarantees are required by the contract.

### 4.7 Data protection

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