ZOE. Institute for future-fit economies gUG
Norbertstr. 31
50670 Cologne

Call for Proposals: Data harmonization and collection for well-being and sustainability indicators (Horizon Europe project MERGE)

Who we are

ZOE, the Institute for Future-fit Economies, is a non-profit and independent think & do tank. We are dedicated to research for a future-fit economy. At the interface of politics, science and civil society, we develop trend-setting impulses for the fundamental questions of economic development.

We believe that our society's behaviour disproportionately hurts the most marginalized people – including people of colour, people from working class backgrounds, people with disabilities, women and LGBTIQ people. We are committed to challenge this through our work for socially just development and by creating a diverse workplace at our organisation.

About the project

In the current increasingly complex world it is important to improve the systemic use of scientific multidisciplinary evidence to support policy practitioners. MERGE is an innovative Horizon Europe-funded Coordination and Support Action (CSA) project (hereinafter called "the project"). It brings together a multidisciplinary community of researchers, statisticians, policy practitioners, think tanks and civil society organizations (hereinafter called "project partners"). It aims to integrate wellbeing, inclusion, and sustainability indicators into multilevel governance policy through science and policy interface, improved scientific knowledge, capacity building and practical policy design and evaluation tools.

The project aims to improve the usability and accessibility of policy frameworks and indicators for inclusive and sustainable wellbeing through collaboration. With a €3,6 million budget, the involvement of 16 institutions and a 3-year timeline (2024-2026), MERGE is working to improve usability and accessibility of inclusive and sustainable wellbeing indicators.

More information can be found here.

Scope of work

The project operates through two complementary streams: technical and policy. Within the technical stream, the ZOE Institute for Future-fit Economies spearheads a Working Package (WP) designed to conduct a series of in-depth examinations known as "technical and data deep dives."

One pivotal task within this WP is to address the data gaps and lack of harmonization and coordination across Member States for selected well-being and beyond GDP indicators and sustainability indicators.

As part of the work on this project, we are looking for a partner (hereinafter called "research partner" or "contractor") that can lead this work and conduct the following activities:

- Conduct 20-25 online **interviews** with statistical officers from National Statistics Institutes to gain an understanding of how these indicators are collected, and what is limiting their frequency of publication and granularity.
    - This task will involve preparing questionnaires and any additional documentation required, identifying participants, drafting and sending interview invitations, setting up and conducting the interviews, taking notes, among others.
- **Analyse interview data and write a discussion paper** that provides recommendations on how to move forward.
- **Co-organise with the European Commission's Joint Research Centre (JRC) a roundtable** to discuss these recommendations.
    - This tasks involves developing the concept, agenda, format and methodology of the roundtable, identifying relevant speakers and participants, drafting and sending invitations, facilitating/hosting the event, taking notes and documenting the main findings of the event.
    - The roundtable is expected to take place online, but the research partner is expected to be flexible if the opportunity to host it in-person emerges. If the roundtable takes place in person, the budget for hosting the event and covering the travel expenses of the contractor to the venue will be covered by contracting authority.
- **Draft a summary report** synthetizing the main findings of the interviews and the roundtable.

We aim for a close collaboration with regular exchange between the contractor, and the project's partners to deliver on the objectives described above. The research partner is also expected to contribute to fulfil the necessary formal requirements of the project, such as contributing to the technical reporting linked to this task, use project template for the deliverable, and provide the necessary information for drafting any data sharing agreements. Likewise, they are expected to sign a Joint Controllership Agreement with relevant partners to ensure information exchange follows existing regulations.

Who we are looking for

We are looking for an organisation specialized in the above-mentioned activities with a proven record on delivering high-quality research preferably in the context of EU funded projects such as Horizon Europe and LIFE. We are looking for organisations that share our core principles: value orientation, sustainability, agility and self-responsibility.

Evaluation criteria and conditions

Evaluation criteria:

1. Price – weight 0.4

2. Content experience – weight 0.35

Proven track record of providing services under at least two contracts within the last 3 years, dealing globally with all the topics listed below:

a. Conducting interviews and analysing interview data to extract and provide recommendations
b. Knowledge about sustainable and inclusive wellbeing indicators (including technical aspects)
c. Experience understanding barriers to the adoption of new indicators
d. Experience working with statistical officers and offices
e. Experience working at the intersection of science and policy, preparing outputs targeting different and diverse audiences

As evidence of fulfilling this criterion the tenderer shall submit a description of the work done under the contracts (containing at least: timeframe of each contract and detailed description of how contractor is meeting criteria a – e).

3. Public sector/EU-level project experience – weight 0.25

Experience in research projects for public sector or EU-funded projects [Horizon Europe/LIFE] within the last 3 years, defined as proven track record of providing services under at least 2 contracts with a budget of at least 40,000 EUR.

As evidence of fulfilling this criterion the tenderer shall submit the description of the work done under the contract along with the sample work portfolio in the technical offer.

The Total Score for an offer will be evaluated based on the following equation:

TS = C1 *0.4 + C2 * 0.35 + C3 * 0.25

TS - Total Score of the tender under consideration

C1 – C3 – Criteria listed above

Price points (under C1) of the tender under consideration = lowest price of all compliant tenders / price of the tender under consideration

Conditions:

Max. Budget: 40,000€

Delivery Timeframe:

December 2024-December 2026

Important milestones include:

- [TBD between April 2025 and October 2025]: Roundtable takes place
- October 2025: Summary report submission

Funded by the European Union

MERGE project # 101132524

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Additional information

We may negotiate the terms of the tenders, but we are obliged not to discriminate against any tenderer in doing so. This procedure shall be carried out in compliance with the principle of competitiveness and the principle of economical and expedient spending of funds.

Application procedure

Please send your offer describing your organisation's profile and track-record with the above-mentioned tasks to magali.brosio@zoe-institut.de by **November 21st, 2024, 23:59 at the latest**. **Please state "MERGE wellbeing and sustainability indicators proposal" in the subject line.**

The offer should include:

- The full name, address or registered office of the supplier, telephone number and register number (if applicable),
- Full name and position of the legal representative
- Full name, position and contact details of the main contact person
- Technical offer providing all information how the tenderer fulfils the above criteria of the tender
- Financial offer (see Annex 1 for a template) with the full price presented as a gross price, including VAT, which the contractor is obliged to calculate in accordance with the applicable regulations, and include all costs related to the scope of work. Please include unit costs per work area and number of hours allocated in your financial offer.

Offers shall be prepared in English only. Offers submitted after the deadline will not be considered.

Please send any questions related to this call to magali.brosio@zoe-institut.de no later than 14/11/2024

The bidder shall be bound by their offer for a period of 30 days from the date of submission.

A bidder may, before the deadline for submission of bids, change or withdraw their bid.

During the examination and evaluation of offers, we may request clarification from bidders regarding the content of their offers. We will contact the chosen contractor only.

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Annex 1: Financial tender template

Tasks & Price categories	Unit price	Estimated number of units	TOTAL [EUR]
Coordination			
Interviews			
Report			
Roundtable			
OTHER			
Item 1			
Item 2			
TOTAL:	**€0,00**		