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This document serves as a guide and a summary to apply for the process of “Data Management Service for the Barcelona Institute for Global Health (ISGLOBAL)”.

The candidates must take into consideration the following aspects. Nonetheless, candidates must review exhaustively the compliance with all the requirements included in the document named: “Pliego de Cláusulas Administrativas Particulares (that from now on will be referred to as PCAP)”.

## 1. Solvency requirements

Firstly, natural persons and legal entities, with Spanish or foreign nationality, that possess full capacity to act, must proof that they have enough economic, financial and technical or professional solvency, or the required administrative classification in order to establish a contractual relationship with ISGLOBAL.

### 1.1. Economic and financial solvency

The economic and financial solvency required can be certified through the following manner:

- Document that proofs the existence of an **insurance for professional risks** (civil responsibility). In this sense, the minimum damage covered must sum up to 100.000 EUROS by accident. Additionally, the insurance must be valid until the limit date to submit the offers has come to an end.

This requirement is presumed to be fulfilled if the candidate includes a binding commitment to subscribe to the demanded insurance within the offer, in case of being selected.

### 1.2. Technical and professional solvency

In order to proof the required solvency, candidates must include a document that demonstrates that the candidate fulfills the following conditions:

- a) Data management responsible with the following experience and skills:

- a. Technical skills and experience:

- Data management systems: basic skills in the use and management of platforms of data control, such as, REDCap, DHIS2, OpenMRS, or similar systems, commonly used in the research of data health.
- Database management: competences in in-the-cloud database solutions, such as Amazon RDS, Google BigQuery or Azure SQL Database. Competence with SQL and NoSQL will be considered advantageously, nonetheless, they are not essential requirements.
- Data integration: experience with ETL processes and tools (extract, Transform, Load) to manage data sources composed of heterogeneous data.
- Languages and programming: competence in programming languages such as Python and/ or for data manipulation and automation.
- Data management quality assurance: technical knowledge for validation, cleansing and verification of data, in order to guarantee its accuracy and integrity.

b. Industry sector knowledge:

- Immunization programs: comprehension of immunization programs, including the functioning of vaccines, their security, logistics, delivery and coverage, particularly, in African or similar contexts.
- Maternal and child health: understanding of maternal and child health, as well as the illnesses that provoke a large burden in the health of mothers and child's, especially, infectious illnesses in African or similar contexts.
- Public Health Data: experience in the management of data of public health, more specifically in African or similar contexts.
- Normative knowledge: familiarity with data protection regulation as well as of ethical concerns in the management of public health data, such as, GDPR, HIPAA and local regulations in African countries

c. Project management and communication:

- Project management: experience in the management of large-scale data projects, including planning, execution, monitoring and emission of reports. Familiarity with management project tools, as for instance, Jira, Trello or MS Project.
- Intercultural communication: in-depth and professional communication abilities, including the capacity to work effectively with several teams and external stakeholders from different countries and culture.
- Training and support: capacity to train local personnel and provide continuous support to guarantee sustainability and an adequate use of the data management systems.

d. Experience and academic credentials:

- Professional path: a minimum 2 years' experience in data management, most preferably, in the health or public health sector.
- Previous experience: experience in the provision of similar services in Horizon Europe or EDCTP projects.
- Education certificates: Advanced degree (Masters or PHD) in Data Science, Public Health, Epidemiology, Information Systems, or a related field.
- Background: verified background of successful projects in data management, preferably in low-income contexts or developing countries.
- References and case studies: availability of references and case studies which demonstrate experience and success in similar projects.

**IMPORTANT:** A copy of the CV must be submitted.

**1.3. Additional information:**

- The required solvency can be recognized considering the solvency and resources of other entities, notwithstanding the legal nature of the relationship between the candidate and the third entity. Nonetheless, in this case, the solvency and resources, for the implementation of the contract, must be certified.
- ISGLOBAL can establish a contractual relationship with Temporary Joint Ventures. Consequently, this joint participation, will be instrumentalized in the tender process, by providing a private document that states the will of joint participation. Such document must include: the name and circumstances of the members of the Temporary Business Association, the participation of each one of the members as well as the designation of a representative or agent with enough powers to exercise the necessary actions and ensure compliance with the requirements of the contract until its expiration date. The formalization in public document of the association is not necessary until the selection is not announced.
- The companies that participated in the preparation of the technical aspects of the present contract, will not be considered if their inclusion could provoke restraints in free concurrence or could imply a preferential treatment in comparison with the other candidates.

Additionally, the legal entities that want to be selected, need to include in their purpose, social object (in their corporate statutes or their internal regulations) the provisions of the contract in order to be eligible.

## 2. Conditions to submit the offer (“groups of documents”)

### a. General aspects to take into considerations in the proposals:

- The proposals must be submitted via e-mail within the admission period established and, in the manner established in the PCAP. This email must include:
  - Adress
  - Phone number
  - Email address
  - Contact person to attend any issue
- Any offer submitted after the due date will not be accepted under any circumstances. Additionally, offers that can be evaluated through automatic criteria with an electronic signature executed after the due date established in the tender offer, will not be considered.
- Offers must have a validity date of four months since the opening of the proposals. Once this period is expired, candidates can opt to either, maintain or withdraw their proposals without any penalty.
- Only one offer per candidate can be submitted. This is also applicable for the case that a Temporary Joint Venture is established, as candidates that have submitted an individual proposal cannot be part of a joint offer. In case of non-compliance with the aforementioned, none of the proposals will be admitted.
- The participation of a Temporary Business Association between related companies, will be subject to the framework established in the PCAP.

### b. Presentation requirements and formalities

- Proposals will be formed by three sets of documents. The content of such documents is explained in the next subsection (c).
- All the documents must be signed electronically, and the date of the electronic signature cannot be registered after the due date established for the presentation of offers in the PCAP. Consequently, the failure to comply with this obligation (in any of the documents), will be penalized with the rejection of the offer.
- The submissions email address is: [licitaciones@isglobal.org](mailto:licitaciones@isglobal.org)
- Participants must send a first email before the submission due date attaching the group of documents that are included in **group 1 and group 2**. Under no circumstance, must the candidate submit the set of documents of group 3 in the first email, as if not, the candidate will be excluded from the tender process.

- The subject field of the email must include the title of the offer and the number of files.
- After this, when ISGLOBAL requires the candidates, they will need to submit a second email, in this case, including all the documents part of **group 3**. It is relevant to outline, that the electronic signature date for this document must be prior to the due date to submit the offers, even if submitted afterwards.
- Lastly, the documents with errors or amendments, that prevent to correctly consider the requirements necessary to assess the offer, will not be accepted.

**IMPORTANT:** All documents must be submitted in PDF format.

c. Groups of documents and contents:

- **GROUP 1 documents** (all signed electronically)

This group must contain only the documents indicated:

1. Documents that certify the legal nature and capacity to act of the candidate
  - **SPANISH COMPANY:**
    - Natural persons (individual or professional) are required to submit the ID card (documento nacional de identidad, DNI), or equivalent document, and the tax identification number (número de identificación fiscal, NIF), in the case that it is not indicated in the ID card.
    - Legal entities must submit the tax identification number (código de identificación fiscal, CIF), the corporate statutes correctly registered in the Business Register (whenever this is a compulsory requirement). When this is not compulsory, the company will be required to provide the public document of constitution of the company. For further information in this regard, check the PCAP (clausula 9).
  - **FOREIGN COMPANY:**
    - The capacity to act of foreign companies must be certified by providing:
      - Register in the competent register, considering the local legislation where the company is established and/or was constituted.

- Affidavit that ensures that the company is legally constituted and able to carry out the object of the contract offered.
  - If the candidate is represented by an agent or representative that is a legal entity, the candidate must provide:
    - Public document of powers registered in the corresponding Register.
    - Identification document of the representative.
2. Documents to certify the economic, financial and technical solvency of the candidate (applicable for Spanish and foreign companies):
- Document that justifies the civil insurance (previously mentioned).
  - Curriculum Vitae of the person proposed as responsible of data management.
3. Documents that contain responsibility statements and additional documents (applicable Spanish and foreign companies).
- Document that certifies that the company is not subject to a ban from carrying out public contracts with the public administration as mentioned in the PCAP.
  - Foreign companies' submission to jurisdiction as indicated in the PCAP.
- **GROUP 2 documents** (all signed electronically)
1. Proposal of Management plan for data management (max. 4 pages, letter type arial 12, simple spacing).
  2. Years of experience in European projects of data management (max. 2 pages, letter type arial 12, simple spacing).
  3. Experience in projects related to vaccines and/ or maternal and child health (max. 2 pages, letter type arial 12, simple spacing).

This must be certified in the Curriculum vitae.

- **GROUP 3 documents** (signed electronically)
1. Economic and financial proposal of the offer, considering the model attached to the PCAP (annex 2).  
The price includes all expenditures, taxes and fees that are related to the object of the contract.

Additionally, the offer must include a price breakdown to analyze the Value Added Tax (VAT).

### **3. Documents to submit prior to the assignment**

This section must be considered by the candidate once selected as the most advantageous economic offer.

Once the proposal with the highest score is selected, the candidate will be required to provide, in a period of 10 days (considering the first day as the day after of the requirement) to provide the following documents:

- **NATIONAL COMPANIES:**
  - Document that certifies the registration in the Business Activities Tax (Impuesto de Actividades Económicas, IAE).
  - Certificate issued by the Public Tax Administration in Spain, that certify compliance with tax debts.
  - Positive certificate, issued by the competent body, that certifies compliance with social security payments.
  - Positive Certificate issued by the “Generalitat de Catalunya” that certifies the absence of tax debts with the “Generalitat de Catalunya”.
- **FOREIGN COMPANIES:**
  - Affidavit that certifies the that the company is up to date with tax debts and social security payments.