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| **SOCIOLOGICAL SURVEY IN HOUSING FIELD** | **Project number/ cost centre:**  **23.1821.0-001.00** |

**Terms of reference**

1. **List of abbreviations**

AG Commissioning party

AN Contractor

AVB General terms and conditions of contract (‘local terms and conditions’) for supplying services and work on behalf of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH in Ukraine

FK Expert

FKT Expert days

KZFK Short-term expert

ToRs Terms of reference

TDA Transitional development assistance

SUR GIZ project “Strengthening of Urban Resilience in the Areas of Supply Infrastructure and Housing”

EU European Union

IWO Wohnungswirtschaft Osteuropa (IWO) e.V. - Housing Initiative for Eastern Europe

RDNA4 Fourth Rapid Damage and Needs Assessment

IDPs Internally displaced persons

OSBB Association of co-owners of a multi-apartment building

1. **Context**The GIZ transitional development assistance (TDA) project Strengthening of Urban Resilience in the Areas of Supply Infrastructure and Housing (SUR) systematically strengthens resilience of municipal services of general interest in selected regions. Urban resilience is the ability of an urban system to react resiliently in the event of crises, while at the same time adapting, reshaping, and strengthening itself in terms of sustainable urban development. The project is part of the TDA fields of action reconstruction of basic infrastructure and services as well as disaster risk management.

On the one hand, the project strengthens capacities of partner cities in urban planning and management. This includes e.g. the introduction of digital tools for effective damage assessment or urban planning cadasters. The anchoring of systematic disaster risk management systems is an additional focus. Local sector concepts, development strategies and additional planning documents on different regional levels (e.g. city-wide, quarter-wide, neighborhood-wide) shall be supported, always under the premise to support urban resilience. Furthermore, the project provides qualification measures for municipal staff in the mentioned fields of actions and beyond. In total, urban partners shall be capacitated to plan and shape their development in a resilient manner, which allows them to not only react to external shocks but also supports a long-term sustainability of local developments.

On the other hand, the focus lies on immediate measures to restore the functionality of damaged or destroyed critical supply infrastructure in a robust, adaptive, and, if possible, future-proof manner. Where available, current damage analyses and existing planning principles are used to contribute to the medium- and long-term development of municipalities in the sense of a build-back-better approach. When selecting measures, care must be taken to ensure that they are modular, flexible, replicable, scalable, and can be implemented quickly in order to achieve economies of scale in procurement processes. Of particular importance is the consideration of local winter relief measures and aid offers from the international community. In addition, the selected cities and municipalities, as well as private actors (owners, if possible, owner associations or neighborhood cooperatives), are supported in the rehabilitation, repair, and creation of housing. The measures proposed here primarily address simple buildings, in the case of rehabilitation, buildings with light (windows, roofing, façade, etc.) and medium damage (light structural damage to walls/ceiling/roof) without significant, structurally relevant damage.

**Situational background**

The Fourth Rapid Damage and Needs Assessment (RDNA4) study shows that about 13% of Ukraine's housing stock has been damaged or destroyed as a result of Russian military aggression, affecting more than 2.5 million households. Reconstruction and needs in this sector are the highest among the overall long-term needs. At the same time, millions of people have been displaced within the country or were stranded abroad.

The consequences of the aggression have brought a major shift in the housing market, from a model dominated by owner-occupied apartments to an increasing demand for affordable rental options. This shift is driven by the economic constraints faced by many households, making it difficult for them to secure new ownership. The evolving market dynamics create an opportunity to diversify housing options and strengthen urban resilience through social and affordable rental housing. This aligns directly with the objectives of the GIZ project “Strengthening urban resilience in the areas of supply infrastructure and housing in Ukraine (SUR)”, which seeks to support a more adaptable housing market as a critical component of social stability and urban resilience.

The aims of the SUR project activities in the field of housing is to develop the capacity of cities to respond to the housing challenges and threats caused by Russian military aggression, while addressing pre-existing structural problems in the housing sector. Among other measures, the project includes housing needs assessment in four cities for the subsequent development of the local resilient housing strategies.

Therefore, the objective of the tendered services is to conduct the sociological survey and housing needs analysis for the defined target groups in four cities. This data is intended to be used as a basis for goals formulation in the housing strategies.

Background (e. g. short description of the project) and initial situation, in particular the objectives of the services to be tendered. The purpose of the context is to provide the tenderer with relevant information and key data on the project ant its purpose, and to position the ToRs in the overall context of the measure.

The context also explains the specific objective to be achieved by the services.

**Tasks to be performed by the contractor**

* 1. **Tasks**

The contractor is responsible for providing the following services:

**Service package 1. Consultation on the methodology of housing needs assessment at the national and local level.**

* The client submits to the contractor several research approaches to the housing needs assessment. The contractor assesses the feasibility of each approach with regard to data availability and scope of resources and provides the feedback to the client
* Support the SUR and IWO project team in selection of the relevant approach towards housing needs assessment at the local level
* In cooperation with the SUR project and IWO, Operationalize the approach for the assessment in four cities (list the research questions and parameters to be investigated)

Outputs/Deliverables:

* Written and oral feedback to research approaches to the housing needs assessment provided by the client.

**Service package 2. In cooperation with the SUR and IWO team, develop the methodology of housing needs assessment at the local (urban) level**

* Support the formulation of the research questions for the housing needs assessment drafted by IWO.
* Preparation of the quantitative survey design and data collection method (including data collection tools and data cleaning protocols);
* Support the selection of the target groups (e.g. homeowners in OSBBs, homeowners under management companies, tenants of the rental market, with the special focus on IDPs, etc.) and the sampling strategy for the assessment.
* Develop the questionnaire, including the subquestions targeting specific target groups based on the draft questions provided by IWO (see Annex 1).
* Development of the data quality assurance mechanisms;
* Development of the data gathering and data analysis plan;

Outputs/Deliverables:

* Research design (detailed description of the defined research questions, target groups, methods of data collection, sampling, recruiting, quality assurance and data analysis plan)
* Survey questionnaire (up to 30 questions, interviews length up to 30 minutes)

**Service package 3. In cooperation with the SUR project and IWO team, to prepare analytical notes on socio-demographic situation for four cities (Zhytomyr, Bila Tserkva, Poltava, Kremenchuk)**

* Collect and analysis available data regarding socio-demographic situation for four cities (Zhytomyr, Bila Tserkva, Poltava, Kremenchuk) including the periods before and after February 2022 (potentially using open-source data, data from mobile networks, etc.)
* Prepare analytical notes on socio-demographic situation for Zhytomyr, Bila Tserkva, Poltava, Kremenchuk including the periods before and after February 2022 (one analytical note per city)  
    
  Outputs/Deliverables:
* Outline of the analytical notes on socio-demographic situation for Zhytomyr, Bila Tserkva, Poltava, Kremenchuk (one document per city, up to 2 pages, the structure of the document will be defined in the coordination with the SUR project and IWO team).
* Analytical notes on socio-demographic situation for Zhytomyr, Bila Tserkva, Poltava, Kremenchuk (one document per city, up to 10 pages, the structure of the document will be in line with the confirmed outline in the coordination with the SUR project and IWO team).

The contractor is responsible for providing the following work:

**Work package 1  
  
1.1 Conduct the survey in four cities (Zhytomyr, Bila Tserkva, Poltava, Kremenchuk)**

* Organize the data collection activities and survey the respondents with the defined survey method and sample in four cities according to the data gathering plan. Target number of respondents in each city is 400 residents.
* Ensure data protection and data quality
* Conduct monitoring and evaluation of the data quality

Outputs/Deliverables:

* Quantitative data sets per each city (in Excel format)

**1.2 Data analysis and interpretation per city (Zhytomyr, Bila Tserkva, Poltava, Kremenchuk)**

* Analyze the gathered data according to the research questions
* Develop graphical and descriptive representation of the information
* Interpret the results and identify correlations in four target cities including data correlation points, segregation of data according to belonging to target groups, age, sex, household composition, etc..

Outputs/deliverables:

* Presentation/report with the data analysis per city

Interpretation of the data in a short report form in the Word format, in English and Ukrainian, up to 10 pages per city.

Certain milestones, as laid out in the table below, are to be achieved during the contract term:

|  |  |
| --- | --- |
| **Milestones/process steps/partial services** | **Anticipated deadline/place/person responsible** |
| **Service package 1. Consultation on the methodology of housing needs assessment at the national and local level.**   * Written and oral feedback to research approaches to the housing needs assessment provided by the client. | 20.12.2025 10.03.2026 Ukraine, remotely / contractor |
| **Service package 2. In cooperation with the SUR and IWO team, develop the methodology of housing needs assessment at the local (urban) level**   * Research design (detailed description of the defined research questions, target groups, methods of data collection, sampling, recruiting, quality assurance and data analysis plan) * Survey questionnaire (up to 30 questions, interviews length up to 30 minutes) | 10.01.2026, Ukraine, remotely / contractor |
| **Service package 3. In cooperation with the SUR project and IWO team, to prepare analytical notes on socio-demographic situation for four cities (Zhytomyr, Bila Tserkva, Poltava, Kremenchuk)**   * Outline of the analytical notes on socio-demographic situation for Zhytomyr, Bila Tserkva, Poltava, Kremenchuk (one document per city, up to 2 pages, the structure of the document will be defined in the coordination with the SUR project and IWO team). * Analytical notes on socio-demographic situation for Zhytomyr, Bila Tserkva, Poltava, Kremenchuk (one document per city, up to 10 pages, the structure of the document will be in line with the confirmed outline in the coordination with the SUR project and IWO team). | 20.12.2025, 10.03.2026,  Ukraine, remotely / contractor |

|  |  |  |
| --- | --- | --- |
| **Milestones/partial works** | **Anticipated deadline/place/person responsible** | **Criteria for acceptance** |
| **Work package 1.  1.1 Conduct the survey in four cities, 400 respondents per city (Zhytomyr, Bila Tserkva, Poltava, Kremenchuk)**  Quantitative data sets per each city (in xlsx format) | 25.02.2026,  Ukraine, remotely / contractor | Provision of the quantitative data sets per each city (in excel format) in Ukrainian language. |
| **Work package 1.  1.2 Data analysis and interpretation per city (Zhytomyr, Bila Tserkva, Poltava, Kremenchuk)**   * Presentation/report with the data analysis per city (up to 10 pages per city, in English and Ukrainian, in ppt or pdf or docx format) * Interpretation of the data in a short report form in the pdf or docx format, in English and Ukrainian, up to 10 pages per city. | 10.03.2026 Ukraine, remotely / contractor | Provision of the presentation/report with the data analysis per city in Ukrainian and English (doc or ppt formats) as well as interpretation of the data in a short report form in the text format (docx), in English and Ukrainian, up to 10 pages per city. |

The contract duration is from 21.11.2025 till 25.03.2026.

* 1. **Deliverables and Reporting:**

The Contractor will be responsible for the following:

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| --- | --- | --- |
| **Reporting/ Deliverable #** | **Requirements to the format** | **Anticipated period, by** |
| **Service package 1. Consultation on the methodology of housing needs assessment at the national and local level.**   * Written and oral feedback to research approaches to the housing needs assessment provided by the client. | Provision of summaries, comments, presentations and emails upon request (in the written form (docx, ppt) in English and Ukrainian; | 20.12.2025, 10.03.2026 Ukraine, remotely / contractor |
| **Service package 2. In cooperation with the SUR and IWO team, develop the methodology of housing needs assessment at the local (urban) level**   * Research design (detailed description of the defined research questions, target groups, methods of data collection, sampling, recruiting, quality assurance and data analysis plan) * Survey questionnaire (up to 20-30 questions, interviews length up to 20 minutes) | Provision of the research design in the text (docx, ppt) format in Ukrainian and English | 10.01.2026,  Ukraine, remotely / contractor |
| **Service package 3. In cooperation with the SUR project and IWO team, to prepare analytical notes on socio-demographic situation for four cities (Zhytomyr, Bila Tserkva, Poltava, Kremenchuk)**   * Outline of the analytical notes on socio-demographic situation for Zhytomyr, Bila Tserkva, Poltava, Kremenchuk (one document per city, up to 2 pages, the structure of the document will be defined in the coordination with the SUR project and IWO team). * Analytical notes on socio-demographic situation for Zhytomyr, Bila Tserkva, Poltava, Kremenchuk (one document per city, up to 10 pages, the structure of the document will be in line with the confirmed outline in the coordination with the SUR project and IWO team). | Provision of the outline of the analytical notes as well as analytical notes in the text (docx, ppt) format in Ukrainian and English | 20.12.2025, 10.03.2026,  Ukraine, remotely / contractor |
| **Work package 1.**  **1.1 Conduct the survey in four cities, 400 respondents per city (Zhytomyr, Bila Tserkva, Poltava, Kremenchuk)**  - Quantitative data sets per each city (in Excel format) | Provision of the quantitative data sets per each city (in excel format) in Ukrainian language. | 25.02.2026,  Ukraine, remotely / contractor |
| **Work package 1.  1.2 Data analysis and interpretation per city (Zhytomyr, Bila Tserkva, Poltava, Kremenchuk)**  - Presentation/report with the data analysis per city  - Interpretation of the data in a short report form in the Word format, in English and Ukrainian, up to 10 pages per city. | Provision of the presentation/report with the data analysis per city in Ukrainian and English (doc or ppt formats) as well as interpretation of the data in a short report form in the text format (docx), in English and Ukrainian, up to 10 pages per city. | 10.03.2026  Ukraine, remotely / contractor |

1. Concept (technical-methodological design)

In the bid, the tenderer is required to show *how* the objectives defined in Chapter 2 (Tasks to be performed) are to be achieved, if applicable under consideration of further method-related requirements (technical-methodological concept). In addition, the tenderer must describe the project management system for service provision.

Note: The numbers in parentheses correspond to the lines of the technical assessment grid.

## Technical-methodological concept

**Strategy (1.1)**: The tenderer is required to consider the tasks to be performed with reference to the objectives of the services put out to tender (see Chapter 1 Context) (1.1.1). Following this, the tenderer presents and justifies the explicit strategy with which it intends to provide the services for which it is responsible (see Chapter 2 Tasks to be performed) (1.1.2).

The tenderer is required to present the actors relevant for the services for which it is responsible and describe the **cooperation (1.2.1)** with them.

The tenderer is required to describe the key **processes** for the services for which it is responsible and create an **operational plan** or schedule (1.4.1) that describes how the services according to Chapter 2 (Tasks to be performed by the contractor) are to be provided. In particular, the tenderer is required to describe the necessary work steps and, if applicable, take account of the milestones and **contributions** of other actors (partner contributions) in accordance with Chapter 2 (Tasks to be performed) (1.4.2).

1. Personnel concept (proposed staff)

The Contractor is required to provide personnel who are suited to filling the positions described, on the basis of their CVs (see Chapter 10), the range of tasks involved and the required qualifications.

The personnel must be provided for all positions, otherwise, the bid will be disqualified. Each expert can hold only one position, multiple position holding is not permitted.

The below specified qualifications represent the requirements to reach the maximum number of points in the technical assessment.

## Team leader

Tasks of the team leader

* Overall responsibility for the advisory packages of the contractor (quality and deadlines)
* Coordinating and ensuring communication with GIZ, partners and others involved in the project
* Personnel management, in particular identifying the need for short-term assignments within the available budget, as well as planning and steering assignments and supporting local and international short-term experts
* Preparation of the reports and presentations
* Regular reporting in accordance with deadlines

Qualifications of the team leader

* Education/training (2.1.1): university degree (Master) in Sociology, Data management or similar 10 points, 5 points for Bachelor degree, lower level of education – 0.
* Language (2.1.2): C2 in Ukrainian language, C1-level language proficiency in English *: C2 in Ukrainian and C1 in English – 10 points; B1 in English and C1 in Ukrainian - 5 points; 0 points - less than B1 in English (at level C1 in Ukrainian)*,
* General professional experience (2.1.3): 8 years of professional experience in the sociological sector
* Specific professional experience (2.1.4): 5 years in quantitative sociological research
* Leadership/management experience (2.1.5): 3 years of management/leadership experience as project team leader or manager in a company
* Regional experience (2.1.6): 5 years of experience in projects in Ukraine

## Key expert 1

Tasks of key expert 1

* Methodology development and research design
* Analysis of the collected data, preparation of the reports and presentations

Qualifications of key expert 1

* Education/training (2.2.1): Master degree ( in Sociology, Data analysis or similar 10 points, 5 points for Bachelor degree, lower level of education – 0
* Language (2.2.2): C2 in Ukrainian language , C1-level language proficiency in English language *: C2 in Ukrainian and C1 in English – 10 points; B1 in English and C1 in Ukrainian - 5 points; 0 points - less than B1 in English (at level C1 in Ukrainian)*,
* General professional experience (2.2.3): 4 years of professional experience in the sociological sector
* Specific professional experience (2.2.4): 4 years in data analysis

Regional experience (2.2.6): 4 years of experience in projects in Ukraine (Soft skills of team members

In addition to their specialist qualifications, the following qualifications are required of team members:

* Team skills
* Initiative
* Communication skills
* Socio-cultural skills
* Efficient, partner- and client-focused working methods
* Interdisciplinary thinking

**Specification of inputs**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Fee days** | **Unit of measurement** | **Number of experts** | **Total number of days** | **Comments (if any)** |
| **Designation of TL** | **day** | **1** | **50** |  |
| **Designation of key expert** | **day** | **1** | **58** |  |

The following basic calculations for the contract for works are a reference value based on the acceptance criteria for each partial work/milestone specified in Chapter 2 (Tasks to be performed by the contractor).

Since the contract to be concluded is a contract for works, we would ask you to offer your services at a lump sum price.

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| --- | --- | --- |
| **Milestones/partial works** | **Estimated expert days for orientation** | **Anticipated deadline/place/person responsible** |
| **Work package 1.**  **1.1 Conduct the survey in four cities, 400 respondents per city (Zhytomyr, Bila Tserkva, Poltava, Kremenchuk)**  - Quantitative data sets per each city (in Excel format) | N/A | 25.02.2026,  Ukraine, remotely / contractor |
| **Work package 1.  1.2 Data analysis and interpretation per city (Zhytomyr, Bila Tserkva, Poltava, Kremenchuk)**  - Presentation/report with the data analysis per city  - Interpretation of the data in a short report form in the Word format, in English and Ukrainian, up to 10 pages per city. | N/A | 10.03.2026  Ukraine, remotely / contractor |

1. **Financial provisions**
   1. **Contract value and anticipated payment schedule**

The contract value shall be calculated according to the format of the commercial bid.

**Anticipated payment schedule:**

In consideration of work and services completed, the Contractor shall be paid in the following instalments:

|  |  |  |  |
| --- | --- | --- | --- |
| **Instalment #** | **Anticipated payment date** | **Payment of up to % from total contract value** | **Deliverables and reporting** |
| 1 Advance payment (ADV payment) | 21.11.2025 | 40% | Original invoice |
| 2 Final payment | 25.03.2026 | 60% | Acc. to cl. 1.2 |

* 1. **Financial proposal**

The total cost of the Contract is set in UAH, including all direct and related expenses, taxes and fees, incl. VAT

All costs connected to the contract implementation, e.g. connected management staff, should be covered according to the received amount of the total value of the Contract. No additional budget lines are allowed.

* 1. **Payment Conditions**
* The Contractor shall be paid 40% advance payment against presentation of invoice original witninn 5 working days;
* The remaining amount will be payed as postpayment upon performance against presentation of original invoice, act of acceptance and timesheets submitted in original form within 15 working days after their submission by the Contractor and acceptance by GIZ. The invoice is considered not accepted for payment in case of errors and/or provision of an incomplete package of documents for payment
* All the payments shall be done exclusively in the national currency of Ukraine (UAH) by means of a bank transfer to the bank account of the Contractor;
* All the activities shall be done exclusively within the timeframe of the Contract;
  1. **Requirements to the submission of the financial reporting documents**
* Originals of Invoices, acts of acceptance and timesheets, etc. shall be submitted to the address of the GIZ Project together with the technical documents (reporting/ deliverables) and other financial supporting documents as and if stipulated by the Contract. If the prices in the contract are specified in foreign currency, the Contractor is obliged to indicate prices in all invoices and/or acts of acceptance in two currencies: in foreign currency and in the equivalent amount in UAH and to indicate applied currency exchange rate in accordance with Contract conditions.

- Each invoice and act of acceptance shall contain the Project Number, contract number and the percentage for cost split as follows (if applicable):

* By submitting the Invoice the Contractor should indicate (in the invoice) whether the Contractor is a Single Tax Payer (e.g. 5%, 2%) or a VAT Payer (20%);
* In case the Contractor is a VAT Payer at the moment of the Invoice issuing, the VAT exemption clause shall be applicable and the Contractor should also submit the Tax Invoice to GIZ as soon as that is available.

Timesheet standard template can be found here <https://www.giz.de/sites/default/files/media/els-document/2025-09/time-record-template-days-and-hourly.xls>

1. **Other Provisions**
   1. **General**

The Contract will be signed by the Parties in original form. Each Party agrees to provide the other Party with the original signed Contract and annexes. In this case, the Party that sent the Contract is responsible for the authenticity of the signatures of its authorized representatives and imprint of seal (if any).

The implementation of activities under present Contract can be started only after the Contact enters in force.

With signing of this contract, the parties are fully aware of the respective GIZ provisions, namely General terms and conditions of contract for supplying services and work on behalf of the Deutsche Gesellschaft fur Internationale Zusammenarbeit GmbH in Ukraine, Code of Conduct for Contractors of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH published on the link [Ukraine Tenders | GIZ](https://www.giz.de/en/regions/europe/ukraine/tenders) (section “Terms of procurement of services”/ секція “Умови закупівель послуг”) and such provisions shall be binding on the parties as if stated in full in this agreement.

On the date of signing this Contract, the Contactor confirms that in accordance with the Tax Code of Ukraine, the Contractor is/is not *(shall be specified at the time of contract preparation by the procurement unit responsible for contract preparation)* a payer of value added tax under general conditions.

In case if on the date of Contract signing the Contractor is not registered as a VAT payer and during execution of the Contract the Contractor becomes registered as a VAT payer, the cost of the Contract remains unchanged and is to be considered with VAT. *(shall be deleted in cases VAT free procurements)*

The Contractor shall be responsible for all taxes and other payments according to the Ukrainian law. Taxes, levies or fees to the Government of Ukraine shall be paid by the Contractor.

Contact person from GIZ side responsible for contract implementation and communication with the Contractor Mariia Kostenko, +380637680955, mariia.kostenko@giz.de

The Contractor shall be solely responsible for all the security issues according to the own security concept during the implementation of the Contract. GIZ shall not be reliable and/or responsible for any damages and/or injuries occurred during the implementation of the Contract by any Person directly or indirectly involved into the implementation of the Contract and/or by any other third Person.

The Contractor is obliged to provide the originals of documents indicated in the special agreement at his own expense.

Additionally, the Contractor must:

* be a registered legal entity/private entrepreneur in Ukraine;
* not be on the sanctions list of Ukraine, the EU, the UN;
* ensure that the final beneficiaries/participants are not on the sanctions list of Ukraine, the EU, the UN;
* not be in the process of termination;
* not be registered on temporary occupied territories of Ukraine;
* not have the ultimate beneficial owner, member or participant (shareholder), having a share in the authorized capital of 10 percent or more, which is the Russian Federation, the Republic of Belarus, the Islamic Republic of Iran, a citizen of the Russian Federation, the Republic of Belarus, the Islamic Republic of Iran except for those who live on the territory of Ukraine on legal grounds, or a legal entity created and registered in accordance with the legislation of the Russian Federation, the Republic of Belarus, the Islamic Republic of Iran.

GIZ reserves the right to verify the information at any time. The tenderer confirms that he agrees to the processing of personal data in accordance with the provisions of the EU General Data Protection Regulation (GDPR) and the Law of Ukraine "On the Protection of Personal Data" No. 2297-VI dated 01.06.2010.

# Outsourced processing of personal data The performance of the contract may be associated with the processing of personal data by the contractor, such as (but not limited to) names and contact information. In such cases, the contractor shall act as an independent DATA CONTROLLER and must alone comply with ALL applicable data protection obligations, including those stemming from regional and local laws. The contractor shall process personal data only when a given goal cannot be reasonably attained without such data. The data protection principles such as lawfulness, data minimization, accuracy, purpose limitation, storage limitation, transparency, integrity and confidentiality, and accountability, as well as the numerous rights of the data subject must be paid due attention. The GIZ is NOT in any way responsible for such processing.

# Whenever the contractor executes the instructions of a partner to the GIZ with regard to such processing, the partner shall be the data controller, and the data processing shall be carried out in accordance with the partner’s instructions as well as laws and standards to which it is subject.

# If the contractor is not subject to the GDPR and the applicable laws do not contain any explanation on the data protection principles and rights mentioned here, the definitions and meanings provided by the GDPR (Regulation (EU) 2016/679) should be considered.

# The data collection for GIZ monitoring, evaluation and reporting activities must be conducted strictly anonymously, meaning that any information relating to an identified or identifiable natural person (‘data subject’) must be excluded.

1. **Requirements to the format of the bid**
   1. **Documents to be submitted**
      1. **Technical bid**

Tenderers must provide the following documents:

* a technical bid containing a description of the methodology proposed in relation to the identified tasks. **Technical bid must be signed and stamped (if stamp is used);**
* *tentative work plan;*
* *personnel (team) concept*
* *CVs of all experts with relevant work experience, qualifications (education, certificates).*

The structure of the technical bid must correspond to the structure of the ToRs. In particular, the detailed structure of the concept (Chapter 3) should be organised in accordance with the positively weighted criteria in the assessment grid (not with zero). The technical bid must be legible (font size 11 or larger) and clearly formulated. It must be drawn up in English (language).

The complete technical bid must not exceed 10 pages (excluding CVs). If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment. External content (e.g. links to websites) will also not be considered.

The CVs of the personnel proposed in accordance with Chapter 4 of the ToRs must be submitted using the format specified in the terms and conditions for application (if such format of CV is set). The CVs shall not exceed 4 pages each. They must clearly show the position and job the proposed person held in the reference project and for how long. The CVs must be drawn up in English      (language).

**The technical bid must not include any financial information such as daily fees for experts or any other payments. Otherwise the bid will be disqualified.**

* + 1. **Commercial bid**

The commercial bid must include the costs associated with the implementation of the assignment and must be provided according to the format provided in the tender documentation.

**Commercial bid must be signed and stamped (if stamp is used).**

* + 1. **Registration documents of the tenderer**

Shall be provide according to the requirements of tender documentation

* + 1. **Documents for tenderer’s eligibility confirmation**

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| --- | --- |
| **The tenderer is obliged to conform to the following eligibility requirements:** | **The tenderer must provide the following document to confirm the compliance with eligibility requirements:** |
| Experience in implementing projects in the field of quantitative sociological surveysin Ukraine | Portfolio with the implemented (that contains all relevant information to the concept and implementation). At least 3 reference projects in the field of quantitative surveys in Ukraine in the last 36 months. |
| Minimum average annual turnover for the last three financial years 800,000.00 UAH | Free format document signed |
| Minimum average number of permanent employees for the last three calendar years 5 persons | Free format document signed |

The tenderer must:

* be a registered legal entity/private entrepreneur in Ukraine;
* not be on the sanctions list of Ukraine, the EU, the UN;
* ensure that the final beneficiaries/participants are not on the sanctions list of Ukraine, the EU, the UN;
* not be in the process of termination;
* not be registered on temporary occupied territories of Ukraine;
* not have the ultimate beneficial owner, member or participant (shareholder), having a share in the authorized capital of 10 percent or more, which is the Russian Federation, the Republic of Belarus, the Islamic Republic of Iran, a citizen of the Russian Federation, the Republic of Belarus, the Islamic Republic of Iran except for those who live on the territory of Ukraine on legal grounds, or a legal entity created and registered in accordance with the legislation of the Russian Federation, the Republic of Belarus, the Islamic Republic of Iran.

GIZ reserves the right to verify the information at any time. The tenderer confirms that he agrees to the processing of personal data in accordance with the provisions of the EU General Data Protection Regulation (GDPR) and the Law of Ukraine "On the Protection of Personal Data" No. 2297-VI dated 01.06.2010.

* **Annexes** - Annex 1 – Draft of the questions for the questionnaire

**Annex 1 Draft of the questions for the questionnaire**

Target groups

* apartment owners (distributed per housing management form – OSBB, managing company, self-governance, or unknown to respondent)
* private house owners
* tenant-occupiers at the free market
* those living with family/friends for free (IDPs)
* living in collective sites (МТП) and temporary housing (IDPs)

Each group should be analyzed in relation to their demographic characteristics (work age persons, pensioners, gender etc.).

Research questions

Overall RQ for all groups:

What are your housing conditions, expenses, needs and problems with regard to housing?

Questions common for all groups

* Where are you currently living? (Owned apartment in MAB; own private house; rented apartment; rented house; collective site for IDPs; with family/friends for free; temporary housing, name your option)
* Level of satisfaction with the housing conditions

a) level of satisfaction with the apartment/house

b) level of satisfaction with the MAB

c) with housing territory

* Would you describe your living space as sufficient for your household or insufficient?
* What % of your household income is spent for housing expenses (utility and housing bills, ipotheke etc.)?
* Do you have any of the housing needs listed below? (Multiple choice, incl. utility subsidy; state support with buying apartments; compensation of rent; cannot cover any housing bills and need full support of the state)

Questions for owners-occupiers in MABs

* Does your house have an OSBB? (Or choose another form)
* Would you assess your utility bills as low or too high (Likert scale)
* Would you assess your housing maintenance bills as low or too high? Fair or unfair?
* Does your MAB have a capital repair fund?
* Would you say that you pay enough for sufficient management of your MAF?
* Would you call yourself a responsible homeowner?
* Does your house need (minor repairs, major repairs, thermomodernization need)
* Are you actively taking part in managing your MAB?
* Which expectations do you have from the local authorities with regard to managing your MAB?

Private house owners

* Are you capable of maintaining your house and satisfying your housing needs on your own?
* Do you think there should be some public programs for homeowners? (possibly, multiple choice)
* What are the biggest challenges of being an owner-occupier in a private house?

Tenant-occupiers at the free market

* How would you assess your rent payments? (from low to too high)
* Do you have an official rental contract?
  + What is duration of the contract?
  + Is it officially registered?
* Do you think that your terms of rent are fair and secure?
  + Do you fear a sudden eviction?
  + Do you fear a sudden raise of your rent?
  + Do you think your landlord is behaving professionally?
  + Is your house and apartment receiving the
* How would you assess the level of risk that you can loose ability to
* Do you feel at home in your rental apartment?
* Are you considering purchasing an apartment?

Living in collective site/temporary or other forms of public housing

* Do you pay for your accommodation?
* Are you considering to move out of your current location?
* What are the disadvantages of living in your current location? (multiple choice)
* What are the advantages of living in your current location? (multiple choice)

Living with family/friends

* Do you pay for your accommodation?
* Are you considering to move out of your current location?
* What are the disadvantages of living in your current location? (multiple choice)
* What are the advantages of living in your current location? (multiple choice)

Disclaimer. This is an approximate set of questions. The contractor is expected to consult the client on the feasibility, formulation, and prioritization of the questions with regard to the research goals.