EIGE/2013/OPER/02

TENDER SPECIFICATIONS

Study on area F of the Beijing Platform for Action – Women and the Economy

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

In order to meet these objectives, EIGE shall collect, analyse and disseminate relevant objective, comparable and reliable information and data on equality between women and men at European Union level. 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.[4]

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 support to the Presidency countries of the Council of the EU by monitoring progress in the selected critical areas of concern of the Beijing Platform for Action.

1.2 BACKGROUND INFORMATION

1.2.1 EU COMMITMENT TO THE BEIJING PLATFORM FOR ACTION

The 4th World Conference on Women, held in Beijing in 1995, officially adopted the *Beijing Declaration and Platform for Action for Equality, Development and Peace* (BPfA).[5] The BPfA outlines the strategic objectives and actions to be taken by the international community, national governments and civil society for the promotion and protection of human rights for women and the girl child as inalienable, integral and indivisible elements of universal human rights[6]. Its objectives and actions are arranged throughout twelve critical areas of concern: (A) women and poverty, (B) education and training of women, (C) women and health, (D) violence

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[1] Articles 2 and 3(3) TEU and Article 8 TFEU.
[2] Established by the European Parliament and of the Council Regulation (EC) No 1922/2006 of 20 December 2006 (OJ L 403/9 of 30.12.2006)
[3] Article 2, Idem 2
[4] Article 3, Idem 2
[5] Beijing Declaration and Platform for Action http://www.un.org/womenwatch/daw/beijing/platform/
[6] Mission Statement, http://www.un.org/womenwatch/daw/beijing/platform/plat1.htm#concern

against women, (E) women and armed conflict, (F) women and the economy, (G) women in power and decision-making, (H) institutional mechanisms for the advancement of women, (I) human rights of women, (J) women and the media, (K) women and the environment and (L) the girl child.

All 27 EU Member States and Croatia have signed the document and thus have recognised their responsibility to take actions to implement the BPfA. While national governments have the primary responsibility for the advancement of women, the European Union was involved in the formulation of the Beijing Declaration and has committed itself to promoting the BPfA objectives. In December 1995, the European Council acknowledged the European Union's commitment to the BPfA and expressed its intent to review BPfA implementation across the Member States on a yearly basis. Since 1999, quantitative and qualitative indicators have been developed by successive presidencies of the Council for the purposes of monitoring progress towards achieving the BPfA goals. By 2012, the Council had adopted indicators in 10 out of 12 critical areas. Furthermore, in order to review the development in the implementation of BPfA at EU level, two overview reports have been produced: *Beijing +10: Progress made within the European Union* by the Luxembourg presidency of the Council in 2005[7], and *Beijing+15: The Platform for Action and the European Union* by the Swedish Presidency in 2010[8].

1.2.2 WOMEN AND THE ECONOMY

Equality between women and men is a fundamental value of the EU, which also values a principle of equal economic independence of women and men. Gender equality requires expanding the capacity of women to make genuine choices about their lives through full and equal participation in all spheres of life. As stated in the Commission's Strategy for Equality between Women and Men 2010-2015, 'Despite a general trend towards more equality in society and in the labour market, progress in eliminating gender inequalities remains slow. Economic independence is a prerequisite for enabling both women and men to exercise control over their lives and to make genuine choices.'[9] Women's economic independence also means having their work, both paid and unpaid, recognised and valued, both socially and economically.
Women's access to more and better jobs has been widely recognized as an important factor for growth, eradication of poverty and empowerment. Employment enhances financial independence of women and often results in shifts in the position of women within the household and beyond.

Europe 2020, the EU's 10-year growth strategy, identifies gender equality as an objective in some of its subsections, primarily with regard to employment (one of the objectives is to increase the employment rate to 75 % of both women and men), equal pay, childcare provision, work-life balance and increasing employment in the care sector. The strategy acknowledges that 'policies to promote gender equality will be needed to increase labour force participation, thus adding to growth and social cohesion.' This allows for a strategic link between gender mainstreaming strategies to support gender equality policies and policies aiming to increase female economic independence and female participation in the labour

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7 http://ec.europa.eu/social/BlobServlet?docId=3683&langId=en

8 http://www.eige.europa.eu/content/document/beijing-15-platform-action-and-european-union-report-swedish-presidency-council-eur

9 Strategy for equality between women and men 2010-2015, Chapter 1: Equal economic independence: http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:0491:FIN:en:PDF

market. Europe 2020 also removes barriers and forms of discrimination preventing women from equal access to jobs and income.

In order to implement the goals of Europe 2020 and make the EU a 'smart, sustainable and inclusive economy', resources, both at national and European levels, must be allocated. Active labour policies, taxation initiatives and support for entrepreneurship must be designed consistently to enhance a wide and sustainable participation of all women, especially those at high risk of marginalization and poverty.

In 2010, the EU's gender pay gap for full-time employment varied in the EU, with the lowest pay gap registered in Italy (-1 %) and the highest in Austria (22 %). A large pay gap was also observed for part-time workers, from -17 % in Ireland to 35 % in Spain.[10] These differences could be characterised by the actual participation of women and men in part-time work. The reasons for this pay gap are complex. Women are more likely to be working low-paying jobs (21 % of female employees were low-wage earners compared to 13 % of male employees[11]), and be engaged in temporary and part-time work (15 % of female employees were temporary employees compared to 13 % for men [16-64][12]; 31 % of female employees work part-time compared to 8 % of men [15-64][13]). Women are particularly over-represented in service sectors with high levels of lower-paid work such accommodation and food service activities, and also human health and social work activities (71 % of those employed in these aforementioned sectors are women[14]). The mean annual earnings in the accommodation and food service activities is EUR 20.786 (women earn around EUR 18.758, while men earn EUR 23.270). In the human health and social work activities, the mean annual earnings is EUR 30.654 (women earn EUR 28.174; men earn EUR 38.865). In the highest-paid sector, financial and insurance activities, the annual mean income is EUR 51.760, but women earn about EUR 38.176, while men earn EUR 66.743.[15]

Entrepreneurship can offer women the possibility to ensure participation in the labour market and financial independence. In the perspective of the forthcoming Multiannual Financial Framework 2014-2020, and in accordance with the key actions to Europe 2020, the Commission's Strategy for Equality between Women and Men 2010-2015 intends to support female entrepreneurship as a way to boost women's economic independence. To that end, it is relevant to identify and disseminate effective experiences of female entrepreneurs in the EU. In addition, the Commission aims to support capacity building, mutual learning and networking on female entrepreneurship, which will enhance the effectiveness of gender mainstreaming strategies and promote the design and implementation of relevant gender equality policies. Recent studies[16] show that policies promoting entrepreneurship are likely to increase income and employment, especially among those groups at risk of being excluded and marginalised from labour market (women, young people).

Conversely, fostering entrepreneurship is a key policy goal for governments in all countries because there are shared expectations that high rates of entrepreneurial activity will bring sustained employment creation and thriving new enterprises can boost the development of

10 Eurostat, SES: earn_gr_gpgr2, earn_gr_gpgr2wt
11 Eurostat, SES: earn_ses_pub1s
12 Eurostat, LFS: lfsa_etpga
13 Eurostat, LFS: lfsa_eppgan
14 Eurostat, LFS: lfsa_egan22d
15 Eurostat, SES: earn_ses10_27
16 "Global Employment Trends 2012 - Preventing a deeper jobs crisis" International Labour Office – Geneva: ILO, 2012

new products, production processes and organisational innovations. The particular dynamics of entrepreneurship by women present unique opportunities and challenges, as well as specific contributions to socio-economic development.

Social partners (trade unions and employers) also play a key role in supporting the increase of female employment.

In particular, some recent policies address[17] issues directly related to strategies for:

- reconciling professional and private life of women and men;
- encouraging career development for women and men;
- promoting female entrepreneurship;
- increasing women's participation and role in social dialogue.

To that end, networking, gender training and funding appear to be key areas for identifying, sharing and exchanging good practices on female entrepreneurship.

1.2.3 EIGE's SUPPORT TO THE PRESIDENCIES OF THE COUNCIL

Within the scope of its mandate, since 2011 EIGE has provided technical support to the rotating Presidency of the Council of the European Union as part of the ongoing follow-up of the implementation of the BPfA in the EU. Forthcoming Council Presidencies take up selected issues within the critical areas of concern identified in the BPfA.
In this context, EIGE reviews existing indicators previously adopted by the Council; proposes new indicators when relevant; and develops benchmarking information in the selected critical areas of concern. The overall activity aims at:

- analysing and reviewing the area of concern selected by the upcoming EU Presidency;
- providing advice on updating and improving existing indicators or proposing new ones;
- developing a report on the progress made in the implementation of the BPfA in the selected area;
- promoting the visibility and dissemination of information.

In order to contribute to the implementation of the aforementioned tasks, EIGE is launching this invitation to tender for a service contract regarding the study on area F of the BPfA – Women and the Economy. The purpose of the present study is to address the issues of part-time employment; full-time equivalent employment rate; different types of employment contracts; self-employment; and female entrepreneurship. The study will serve as a basis for EIGE's report to the Greek Presidency of the EU in the first semester of 2014.

1.2.4 EIGE'S WORK ON GOOD PRACTICES

As a tool for achieving gender equality, gender mainstreaming involves a process of incremental change in policies, strategies and activities. The long-term objective is that attention to gender equality will pervade all policies, strategies and activities so that women and men influence, participate in, and benefit equitably from all interventions.

[17] Report on Progress on Equality between Women and Men in 2010 - The contribution of the social partners and businesses, European Commission 2011

EIGE identifies and disseminates good practices on gender equality and gender mainstreaming as the Beijing Platform for Action is implemented at EU and national levels. EIGE also reviews certain areas of concern which are selected by the Presidencies of the EU Council. EIGE's activity aims to provide a wider and deeper knowledge about relevant examples, approaches and experiences in the European Union, which will be useful to support the implementation of gender equality policies and directives.

EIGE was established to assist the EU institutions and the Member States to carry out several tasks, such as the collection, analysis and dissemination of reliable data and information on equality between women and men. This capacity-building process meets the needs of stakeholders and decision makers, enabling them to implement strategies and policies with a gender equality perspective. The key objective is to strengthen the implementation of gender equality policies at European and national levels by providing information and data on gender equality; by enhancing networking and capacity building among stakeholders, and by increasing the awareness on effective methods and tools developed to reduce gender inequalities.

The collected information and materials will contribute to the implementation of EIGE's mandate and:

- widen and improve the available knowledge about tools and approaches on gender mainstreaming at national and EU levels;
- support the Commission and Member States in the implementation of the Strategy for Equality between Women and Men 2010-2015, as well as Europe 2020;
- promote gender awareness;
- support the transfer of effective practices to national, regional and local levels, potentially increasing the gender dimension of, among others, social, employment and education policies;
- enhance the exchange of information and pooling of knowledge on selected issues through thematic networks, at EU and national levels;
- enhance cooperation between different stakeholders – policy-makers, practitioners and academics in the field of implementation of gender equality policies and gender mainstreaming strategies;
- bolster EIGE's Resource and Documentation Centre (RDC).

Providing examples of added value is likely to support the implementation of the principle of gender mainstreaming within the development of social, economic and development policies.

To identify and optimise the use of available resources across the European Union, in 2011 EIGE initiated the collection and processing of tools and methods used by EU institutions and Member States for gender equality work. EIGE has developed a methodology for identifying and assessing good practices. Thus far, the methodology has been tested in the areas Violence against Women and Women and the Media. The results achieved represent the basis of EIGE's further development in the context of identification and dissemination of effective approaches to promote gender equality.

Good practices – Definitions

The term 'Good practice in gender mainstreaming' refers to:

a*ny experience/initiative displaying techniques, methods or approaches which function in a way – and produce effects and results – which is considered to be particularly effective for delivering gender mainstreaming as a transformative strategy and which, therefore, deserves to be disseminated and proposed to other organisational contexts.*

A general preliminary definition of 'good practice' indicates an initiative that:

- has been working well (the practice is finished, or at least shows substantial achievement provided by the practice itself);
- could be replicated elsewhere (transferability);
- is good for learning how to think and act appropriately;
- is embedded within a wider gender mainstreaming strategy.

Networking	Networks are established to support economic independence and participation of women in the labour market through entrepreneurship.
Funding (with specific concern to policies addressing young female entrepreneurs)	Policies set employment targets and allocate financial resources to support female entrepreneurship and related positive actions.
Gender training	Gender training is an educational tool and a process that supports policy-makers in their efforts to integrate gender considerations into all policies and programmes.

1.3 SCOPE OF THE STUDY

The study to be carried out under this contract shall focus on part-time employment, full-time equivalent employment rate, different types of contracts, self-employment and female entrepreneurship in EU Member States and Croatia. Following the objective F1 of the critical area F of the BPfA "*promote women's economic rights and independence, including access to employment, appropriate working conditions and control over economic resources*" the aforementioned areas shall be addressed from the perspective of women's economic independence. The study shall consist of three parts:

Part A of the study will focus on part-time employment, full-time equivalent employment rate, different types of employment contracts and self-employment from the perspective of women's economic independence. The study shall explore different aspects of the use of full-time equivalent as a measurement unit for describing part-time employment.

The study shall provide an overview of the main theoretical discussions about the concept of women's economic independence and its relationship to part-time employment, different types of employment contracts and self-employment. The literature on the impacts of the recent economic crisis on employment rates and contractual arrangements shall also be analysed for relevance. The background overview shall include analysis of the relevant policy and legislative developments that address the issues of part-time employment, different types of employment contracts and self-employment in relation to women's economic independence. The background overview will be based on the analysis of literature and data available through open sources or upon request. The study will provide detailed information about developments since 2008 and, where possible, to provide comparable analysis across the Member States and Croatia.

For the purpose of developing new indicators for measuring F1, the study shall first provide the analysis of quantitative and qualitative data on part-time employment, full-time equivalent employment rate, different types of contracts and self-employment, and their interaction with women's economic independence in all 27 EU Member States and Croatia. The study shall develop a methodological approach for collecting secondary data and information and propose indicators for the first objective of area F.

Part B of the study shall focus on the identification of good practices in the field of Women and the Economy in EU Member States and Croatia, with specific focus on female entrepreneurship.

A broad range of authors have tried to define the entrepreneur and entrepreneurship from a variety of different perspectives and disciplines (economics, management, organisation, sociology, philosophy).
In scientific literature, it is possible to find several definitions of entrepreneurship. For the scope of this study, reference shall be made to Eurovoc's definition of entrepreneur: 'one who organises, owns and manages a business, assuming the risks involved.'

In particular, the study shall take into account the existing effective policies designed and implemented with the purpose of:

- establishing network to promote and support female entrepreneurship;
- designing and implementing training strategies, to promote and support female entrepreneurship;
- allocating and budgeting funds and credit, to enhance female entrepreneurship.

The study will identify relevant examples, highlighting the benefit of gender equality on female entrepreneurship. It will also provide the basis for further networking among stakeholders involved with designing and implementing policies aimed at increasing female participation in the labour market and enhancing economic independence of women.

The contractor is expected to analyse the European and national policies and practices, and provide examples and data about existing effective approaches to female entrepreneurship with specific reference to networking, gender training and funding.

The study shall also address relevant literature in order to collect and prepare a qualitative overview of scientific and political trends within the context of Women and the Economy, with specific focus on female entrepreneurship.

Part C of the study will collect evidence on the benefits of increasing gender equality within the field of entrepreneurship, in addition to the described sections above.

Women's entrepreneurship has been recognised during the last decade as an important untapped source of economic growth. Women entrepreneurs create new jobs for themselves and others. They also provide society with a wealth of diverse solutions to management, organisation and business problems, as well as to the exploitation of entrepreneurial opportunities. Women's lack of opportunity to become entrepreneurs must be addressed by policymakers so that the economic potential of this group can be fully utilised.

Women entrepreneurs can contribute to significant advancement. Even small increases in gender equality in entrepreneurship can produce benefits at various levels: for women as individuals, for society's expectations and stereotypes, for those organizations led by entrepreneurial women. Such changes will improve economy, and improve the quality and direction of economic and social development.

1.4 OBJECTIVES

1. GENERAL OBJECTIVE

The aim of the study is to produce a report on the current stage of implementation of the strategic objective F1 formulated in **area F of the BPfA: Women and the Economy**, with a focus on part-time employment, full-time equivalent employment rate, different types of employment contracts, self-employment and female entrepreneurship from the perspective of women's economic independence. The study shall cover all 27 EU Member States and Croatia.

2. SPECIFIC OBJECTIVES AND TASKS

The specific objectives and tasks of the study are:

Part A

Objective 1. On the basis of a literature and documentation review, to develop an overview of the most recent research, policy and legislative developments in the areas of part-time employment, including measurement of this type of employment though full-time equivalent, different types of employment contracts and self-employment from the perspective of objective F1 of the area of Women and the Economy at EU level, as well as in EU Member States and Croatia. The overall labour market context should be analysed and presented considering employment and unemployment rates (data should be taken from Eurostat) and considering impacts of the economic crisis.

Tasks:

1.1. Describe the methodology used for the literature and documentation review.
1.2. Elaborate on the concept of women's economic independence, and provide analysis of the relation between women's economic independence and part-time employment, different types of employment contracts and self-employment.
1.3. Provide a general overview of the legislative and policy developments in the areas of part-time employment, different types of employment contracts and self-employment in connection to objective F1 at EU level and in EU Member States and Croatia.
1.4. Provide an overview of various research on the following issues which should be analysed from the perspective of women's economic independence:
    1.4.1. employment and unemployment rates in Member States and Croatia;
    1.4.2. full-time employment and part-time employment, and different aspects of it (for example, but not limited to, short-term, long-term, voluntary and involuntary part-time employment);
    1.4.3. indefinite, temporary and fixed time contracts and transitions between contracts;
    1.4.4. trends and aspects of self-employment, including identification of its trends, examination of the nature and different types of self-employment;
    1.4.5. impacts of the economic crisis on employment and unemployment rates, and profile of workers at the EU level, EU Member States and Croatia.

1.5. Analyse methodological aspects of use of full-time equivalent as a measurement unit of part-time employment.
1.6. Ensure transition and integrity of background analysis and analysis of data.
1.7. Provide a list of bibliographical sources addressing the topic.

Objective 2. To collect data on part-time employment, full-time equivalent employment rate, different types of employment contracts and self-employment in connection to objective F1 in EU Member States and Croatia. The data collection should be based on existing secondary data, comparable, harmonised and regularly collected data (for example, data from Eurostat, Eurofound and other international organisations). The contractor is expected to be able to request, receive, process and analyse micro-data. The contractor should present an approach for data gathering to cover the 27 EU Member States and Croatia. The data should reflect the current situation in the Member States and Croatia and serve as a basis for the development of indicators. The collected data should enable a comparability analysis over time (since 2008) and among Member States and Croatia.

Tasks:

2.1. Describe the methodology for secondary data collection and analysis.
2.2. Collect, process and present secondary data and information on aspects of women's economic independence (but not limited to):
   2.2.1. employment and unemployment rates in the Member States and Croatia;
   2.2.2. part-time employment and full-time equivalent employment rate;
   2.2.3. types of employment contracts (full-time, part-time; indefinite, temporary and fixed term contracts);
   2.2.4. self-employment;
   2.2.5. effects of the economic crisis on the employment and unemployment rates and types of contracts.
2.3. Develop country sheets based on the collected information, following the same structure and providing a detailed description of the situation in Member States and Croatia.
2.4. Analyse the trends in each of the Member States and Croatia, and include general conclusions on the aggregated trends in the overview about the overall situation in the EU.
2.5. Build a database where all collected data shall be stored. The database shall allow further data analysis and shall allow data extraction by selected variables.

Objective 3. To provide qualitative and quantitative analysis of the collected data and information.

Tasks:

3.1. Analyse quantitatively and qualitatively the collected data and information from the perspective of women's economic independence, providing a review of the situation at EU level, and in the EU Member States and Croatia.
3.2. Provide analysis on current policy issues around part-time employment, such as the quality of part-time employment, differences across Member States on hours worked by part-timers, remuneration/social contributions associated with part-time employment; career progression issues; analysis of occupations where part-time employment is more prevalent; issues in countries where part-time employment might

be insufficiently available and could result in inactivity; whether part-time employment is voluntary or not, etc.

3.3. Analyse aspects of self-employment. This would lead not only to the identification of all its trends, but also to the examination of the nature and the different types of self-employment in terms of quality, training opportunities, etc.
3.4. Elaborate on the debate about full-time equivalent employment rates.
3.5. Provide comparative analysis over time (since 2008) at EU level, in the EU Member States and Croatia.
3.6. Identify challenges brought about by the economic crisis.
3.7. Provide conclusions and recommendations based on data analysis.

Objective 4. To develop up to three new indicators, including sub-indicators, if necessary, which would facilitate the monitoring of progress in the implementation of objective F1 of the BPfA on the basis of the data and information collected. The methodology should be developed in a way that would enable the measurement of women's economic independence in connection to part-time employment, types of employment contracts and self-employment.

Tasks:

4.1. Describe the methodology used for the development of new indicators.
4.2. Analyse the existing indicators used by different international bodies and take into account recent activities and sets of indicators under development.
4.3. Assess the accessibility, reliability and comparability of the available data for the development of new indicators.
4.4. Propose and describe new indicators, containing for each indicator a justification, a title, a definition and concept, a data source, a data overview and periodicity, the place of publishing and notes, if necessary.
4.5. Collect existing data for new indicators since 2008, showing the trends and developments at EU level, in EU Member States and Croatia.

Objective 5. To prepare a detailed report based on an explanatory background description and literature review, collected data, descriptions of the proposed new indicators and data presenting the situation according to the proposed indicators, and recommendations and conclusions based on the literature review and data analysis (Objectives 1-5).

Objective 6. To prepare specific knowledge-based communication products designed to facilitate the dissemination and accessibility of the results of Part A of the study in a concise and comprehensive manner. These products shall be targeted at EIGE's stakeholders. The overview provided in the dissemination products should be clear and explicit and should be supported by relevant graphics/images. They should be supplied in a publishable form.

Tasks:

6.1. Develop two factsheets presenting the results of Part A of the study in area F of the BPfA, focusing on women's economic independence. The themes for the factsheets will be discussed and agreed upon in consultation with EIGE during the project implementation. The tenderer is expected to propose tentative themes for the factsheets in the technical proposal.
6.2. Develop a summary report (main findings) of Part A of the study. It shall summarise the main aspects of the study and be developed in a format for wider distribution.

6.3. Develop an abstract of Part A of the study and identify key words in order to facilitate classification and identification of the areas covered by it.

Part B

<u>**Objective 7.**</u> To provide a collection of good practices, in connection to objective 1 of the area on Women and the Economy, with a focus on female entrepreneurship.

Tasks:

7.1. Design a methodology guiding the development of the criteria for assessing good practices in the area of female entrepreneurship, with a focus on networking, gender training and funding.
7.2. Carry out a review of a national and European annotated bibliography in connection to objective 1 of the area on Women and the Economy, with a focus on female entrepreneurship. It must include an analysis of existing documents (international, European and national); an overview of relevant research and existing gaps, focusing in particular but not exclusively on networking; gender training; and funding.
7.3. Provide a collection of 15 practices, with potential from which to assess 9 good practices;
7.4. as well as a final collection of 9 good practices through a consultation process.

Part C

<u>**Objective 8**</u>. To identify and collect evidence on specific benefits of gender equality in entrepreneurship at various levels across the EU.

Tasks:

8.1. Identify existing approaches to gender equality in entrepreneurship across the EU.
8.2. Identify, categorise and analyse the potential and actual benefits of gender equality in entrepreneurship at the micro, meso and macro level in the EU.
8.3. Collect evidence of some of those identified benefits in those EU Member States with a proven track record of increasing gender equality in entrepreneurship.
8.4. Reflect on the aggregated benefits for the society at large in EU MS of increasing gender equality in the field of entrepreneurship and its contribution to the economic case of gender equality.

The implementation of the objectives and tasks set in these tender specifications should be fully reflected in the interim reports, final reports, summary reports and the abstract. Over the course of the implementation of the study, EIGE might adjust the tasks without changing the objectives.

1.5 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 in the field. The tenderer shall clearly indicate how the information (literature, documents, etc.) and data existing in any of the EU official languages will be identified, collected and analysed, and how the providers of data and information will be reached. The methodology should cover the following parts:

Part A

The tenderers are expected to propose a methodological approach which will include, but not be limited to:

- the contractor shall describe the methodology of literature and documentation review. The background overview of area F, Women and the Economy, shall include the overview of policy and legislative developments at EU level, and state measures regarding part-time employment, different types of employment contracts and self-employment from the perspective of women's economic independence. It shall also include the review of available data and research on the main thematic aspects of the study described under objectives (Part A). A literature and documentation review shall cover the sources of data and information in all 27 EU Member States and Croatia. The impacts of the economic crisis should be taken into consideration.
- the contractor shall describe the methodology to be applied for the data gathering, review and development of indicators. The data on part-time employment, full-time employment equivalent rate, different types of employment contracts and self-employment shall be presented and analysed from the perspective of women's economic independence at EU level, in EU Member States and in Croatia. The contractor shall use data that is comparable, harmonised and regularly updated (collected by Eurostat, Eurofound and other international sources).
- the contractor shall be ready and able to request, receive and work with micro-data. The contractor shall ensure compliance with the requirements for receiving the micro-data for research purposes.
- the contractor shall develop and apply a methodological approach for collecting information and proposing new indicator(s). The contractor shall propose relevant and feasible indicator(s) and sub-indicators, if necessary, for monitoring objective F1 of the BPfA. Data analysis shall consider both qualitative and quantitative aspects and enable comparison over time and at national level.

Part B

The tenderers are expected to propose a methodological approach which will include, but not be limited to:

- desk and fieldwork research to collect 15 practices with potential which have been applied by Member States in the area of female entrepreneurship;
- a methodological approach, including the design of a specific set of criteria for Women and the Economy, proposed to identify and assess nine good practices (three for each specific topic) in networking, gender training and funding;
- specific criteria to identify and assess practices with potential in the area of Women and the Economy, with focus on in the context of female entrepreneurship;
- the methodological approach to collect practices, the assessment process and procedure, as well as which qualitative criteria will be adopted; how stakeholders will be involved; which tools will be used; and how the team will be organised The collection of good practices will support the Greek Presidency activities on the topic of Women and the economy and it will be disseminated in relevant events;
- a review of the methodology to identify good practices on networking, gender training and funding, in the context of female entrepreneurship. The review must include the main contribution provided by the consultation process, leading to the further selection of 9 good practices.

Part C

The tenders are also expected to include:

- a conceptual framework for understanding some of the main approaches to gender equality in entrepreneurship being implemented today, drawing a distinction between approaches that utilise notions of 'de facto' gender equality and those which are overtly 'women-oriented' in the sense that they promote increasing participation of women in entrepreneurship without removing systemic barriers concerning their full participation. Prior to the development of any methodological tools, the contractor is expected to unpack the concept of 'gender equality in entrepreneurship' and gender-equal entrepreneurship policies and policy-making;
- a description of the methodology for a scoping exercise to identify and map-out expected and achieved benefits from gender-equal entrepreneurship at various levels (micro, meso and macro);
- a description of the methodology to be used to gather evidence of some of the key benefits of gender equality in entrepreneurship. The choice of methods will combine quantitative and qualitative approaches to fully capture the complexities of gender equality in entrepreneurship at various levels. Evidence of benefits of gender equality in entrepreneurship will be based on statistical and qualitative analysis.
- a description of the theoretical and applied elements underpinning the relationship between gender-equal entrepreneurship and the economic case for gender equality.

The proposed methodology for Part A, Part B and Part C should be described in detail in the bid.

1.6 DELIVERABLES

The Contractor shall work closely with EIGE through a regular exchange of information. Throughout the implementation of the study the following deliverables shall be provided:

1. an Inception Report, summarising the discussion of the inception meeting (Week 3);
2. an Interim Report on the first findings of the literature and documentation review, the collection of data and analysis, the progress so far and the next steps (Week 12 for the report and Week 14 for the meeting);
3. a Final Report covering all the items described in specific objectives 1, 2, 3, 4, 5 and 6 together with necessary statistical annexes (Week 22);
4. a Summary Report understandable for non-specialised readers (Week 29);
5. an Abstract (Week 29);
6. two factsheets on objective F1 of the area F of the BPfA (Week 29);
7. 28 country sheets describing situation in each of 27 EU MS and Croatia (Week 22);
8. database of collected information (Week 12-indicative, Week 22-final);
9. a methodological approach for the identification of good practices in the area of female entrepreneurship (focusing on networking, gender training and funding), including specific assessment criteria (Week 3);
10. a literature review on female entrepreneurship (Week 14);
11. a set of 9 good practices (Week 33);
12. a factsheet on good practices in the area of female entrepreneurship (Week 34);
13. a concise report mapping out the benefits of gender equality in entrepreneurship, as well as initial evidence of those benefits in the most relevant EU Member States with a proven track record of increasing gender equality in entrepreneurship (Week 38).

All the deliverables listed above 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 and the abstract must be in MS Word and PDF format. The format of Annexes may vary depending on the type of information presented.

For the preparation of the deliverables, 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[18] and proofread[19], preferably by 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, 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 the 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.

Part A

Deliverable 1: Inception meeting and Inception report

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

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[18] Copyediting. Specifically, these tasks include:
- Assessing the quality of the text (for completeness, accuracy, relevance and coherence)
- Editing/re-writing 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

[19] Proofreading. Specifically these tasks include:
- Proofreading texts (including all footnotes and/or endnotes, captions under photographs, lists, etc.) and insuring 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), 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

project manager and the senior researcher(s) from the Contractor's team shall attend the meeting.

In the inception meeting, the Contractor shall present in detail the methodology for data collection and analysis to be used, including key informants and actors, analytical tools, how the methods proposed are going to be implemented in light of the initial assessment of available information and data, and in particular, how the specific objectives and tasks will be implemented.

The contractor shall also present the results of the initial analysis, including:

- the main findings of the preparatory work undertaken;
- a description of the methodology to be used and the problems encountered;
- data to be collected from different sources, covering all Member States and Croatia;
- a proposed structure for the Interim Report, Final Report, Summary Report, factsheets and Abstract;
- an updated work-plan ensuring the submission of the deliverables within the contractual deadline.

Based on the agreements reached during the meeting, the Contractor shall draw up an Inception Report which is to be submitted to EIGE for approval within five days of the inception meeting. The Inception Report shall present the results of the initial analysis, the agreed methodology to be used for further research, the organisation of work, the planning and timeline for all activities of the project within the contractual deadline and information on the project staff members and their contact details.

The Inception Report, with corresponding Annexes, must be provided in two hard copies and in an electronic copy.

Size: minimum 10 pages and relevant annexes

Language: English (UK)

Deadline: Two weeks after the date of signature of the contract, the inception meeting shall take place in Vilnius. The Contractor shall prepare an Inception Report summarising the elements above and submit it to EIGE no more than five days after the inception meeting. EIGE will have five working days from receipt to approve or comment on the report. Within five days of receiving EIGE's comments, the Contractor shall submit additional information, as well as the Inception Report in the definitive form by electronic and regular mail.

Deliverable 2: Interim report and mid-term meeting

The Interim Report, showing the progress of work undertaken, shall be submitted to EIGE, and a mid-term meeting will take place in Vilnius in order to present preliminary findings and to discuss further details of the study.

The Interim Report shall include, among other things, the following:

- a definition of the key terms and concepts;
- a description of the methodologies used;

- a draft background overview of the situation in EU Member States and Croatia (objective 1);
- a draft overview of the collected data (objective 2);
- preliminary database with country data (objective 2);
- preliminary quantitative and qualitative analysis of the collected data and overview on the reliability and the comparability of the collected data (objective 3);
- a proposal for new indicator(s), which would facilitate the monitoring of progress of implementation of the objective F1 of the BPfA on basis of the collected data and information (objectives 4, 5);
- a preliminary list of topics to be covered in the factsheets. The topics are subject to change during the implementation of the project, in accordance with the preliminary findings (objective 6);
- a separate section containing preliminary information on good practices regarding women's entrepreneurship (objective 7);
- a visual presentation in a ppt format reflecting the structure and content of the Interim report;
- provisional structures for the Final report, based on the Contractors improved understanding of the study developed during the preliminary phase;
- an updated work-plan ensuring the submission of the deliverables within the contractual deadlines.

The Interim Report shall provide preliminary information covering specific objectives 1, 2, 3, 4, 5, 6 and 7 and tasks described under each specific objective, listed under 1.4.2

The Interim Report, with corresponding Annexes, must be provided in two hard copies and in an electronic copy.

<u>Size</u>: minimum 30 pages and relevant annexes

<u>Language</u>: English (UK)

<u>Deadline</u>: Twelve weeks after the date of signature of the contract, the Contractor shall provide the Interim Report to EIGE and participate in the mid-term meeting in Vilnius (W14). EIGE will have 10 working days from receipt of the report to approve or comment. Within 10 days of receiving EIGE's comments, the Contractor shall submit additional information and the Interim Report in its definitive form by electronic and regular mail.

<u>**Deliverable 3**: Final Report and Final meeting</u>

The final detailed analytical report shall be in line with the methodology proposed and agreed upon. It shall answer all the requests raised in the general and specific objectives and the related tasks, as well as requests regarding the Final Report as agreed upon during the inception meeting and mid-term meeting. The analysis, conclusions and recommendations provided shall be clear and explicit. A final meeting will take place in Vilnius in order to present the findings of the study and the report, and to discuss the final details of the study.

The Final Report shall include the following, but not limited to:

- definitions of the key terms and concepts;
- detailed description of the methodologies used;

- background overview of the situation in the 27 EU Member States and Croatia with an with an emphasis on women's economic independence and profile of workers (objective 1);
- overview of the data collected (objective 2);
- quantitative and qualitative analysis of the data on institutional mechanisms in each EU Member States and Croatia (objective 3);
- overview of the accessibility, reliability and comparability of the data collected, identified gaps and recommendations to improve the objectivity, comparability and reliability of data at European level in the area of Women and the Economy (objective 3);
- description and justification of the quantitative and/or qualitative indicator(s) for the objective F1 of the BPfA, including the sub-indicators if necessary, containing the title of the indicator, definition and conceptualisation, data source, data overview, place of publishing and notes, as needed (objectives 4, 5);
- conclusions and recommendations based on the literature review and data collection;
- a visual presentation in a .ppt format reflecting the structure and content of the Final Report;
- all the data collected and analysed presented in tables and graphs (as an Annex);
- all the references and sources reviewed or consulted during the project (as an Annex).

The Final Report shall cover the specific objectives 1, 2, 3, 4, 5, and 6, and tasks described under each specific objective, listed under 1.4.2, together with necessary statistical annexes. The analysis of indicators and sub-indicators will be used for the follow-up of the BPfA in area F: Women and the Economy. The Final Report shall include, among others, the following sections: Introduction; Background; Methodology; Data and analysis covering the EU Member States and Croatia; Conclusions and recommendations; Appendices; References.

In a separate file, all data used for calculations, analysis and visualisations must be presented. The document shall be compatible with MS Excel.

The Final Report, with corresponding Annexes, must be provided in four hard copies and in an electronic copy.

Size: minimum 60 pages and relevant annexes

Language: English (UK)

Deadline: Twenty-two weeks after the date of signature of the contract, the Contractor shall provide the final report to EIGE. EIGE will have 20 working days from receipt of the report to approve or comment. Within 10 days of receiving EIGE's comments, the Contractor shall submit additional information and the Final Report in its definitive form by electronic and regular mail. The Contractor is expected to ensure smooth and efficient communication with EIGE after submission of the Final Report in case clarification regarding provided information is needed.

Deliverable 4: Summary Report

An extended summary will outline the main findings in a concise format and will be developed for wider dissemination. The Summary Report shall bring together the key findings of the Final Report in a reader friendly format, understandable for wider public, with an appropriate layout and relevant graphic elements (such as text boxes, graphics, photos, etc.) to enhance its readability and maximise its impact. The overview provided shall be clear and explicit. The Summary report shall be supplied in a publishable form.

The Summary Report, with corresponding Annexes, must be provided in four hard copies and in an electronic copy.

Size: minimum 20 pages

Language: English (UK)

Deadline: Twenty-nine weeks after the date of signature of the contract the Contractor shall provide the Summary Report to EIGE. EIGE will have 10 working days from receipt of the report to approve or comment. Within 10 days of receiving EIGE's comments, the Contractor shall submit additional information and the Summary Report in its definitive form by electronic and regular mail.

Deliverable 5: Abstract

The Abstract shall provide a brief summary of the study and it shall help the reader quickly ascertain the study's purpose. Proposed structure of the Abstract:

- the focus of the study;
- methodologies used;
- main results and findings;
- main conclusions and recommendations.

The Abstract, must be provided in four hard copies and in an electronic copy.

Size: two pages

Language: English (UK)

Deadline: Twenty-nine weeks after the date of signature of the contract the Contractor shall provide the Abstract to EIGE. EIGE will have 10 working days from receipt of the report to approve or comment. Within 10 days of receiving EIGE's comments, the Contractor shall submit additional information and the Abstract in definitive form by electronic and regular mail.

Deliverable 6: Two factsheets on area F of the BPfA – Women and the Economy

The contractor is expected to develop two factsheets presenting the results of the study. The themes for the reference sheets will be discussed and agreed upon with EIGE. The tenderer may propose the themes for the factsheets in the technical proposal.

The prepared information shall be ready made for a possible future publication of EIGE.

Size: four pages per each factsheet.

Language: English (UK)

Deadline: The Contractor shall provide two factsheets to EIGE 29 weeks after the date of signature of the contract. EIGE will have 10 working days from receipt of the factsheets to approve or comment. Within 10 days of receiving EIGE's comments, the Contractor will submit additional information and the factsheets in their definitive form.

Deliverable 7: 28 Country sheets

The country sheets should provide information collected under the objectives 1, 2, 3, 4 and 5 in a concise and clear manner on the 27 EU Member States and Croatia. The structure of the country sheets should be presented to EIGE and agreed upon during the interim meeting. The tenderer may propose the structure for the country sheets in the technical proposal.

Size: minimum four pages per each country, 28 country sheets (27 EU MS and Croatia)

Language: English (UK)

Deadline: The structure of the country sheets shall be presented to EIGE during the Interim meeting. The contractor shall provide 28 country sheets to EIGE 22 weeks after the date of signature of the contract. EIGE will have 10 working days from receipt of the country sheets to approve or comment. Within 10 days of receiving EIGE's comments, the Contractor will submit additional information and the country sheets in their definitive form.

Deliverable 8: Database

All data collected during the data collection exercise should be stored in a database. The database should allow further data analysis and should allow data extraction by selected variables. Prior to data collection, the proposed structure of the database should be presented to EIGE and agreed upon.

Size: according to the collected information during data collection exercise

Language: English (UK)

Deadline: The draft structure of the database shall be presented to EIGE during the inception meeting. A draft database containing results from questionnaire and data collection exercises should be delivered immediately after closing the field work. The finalised database should be delivered as soon as possible, and no later than 22 weeks after the date of signature of the contract. EIGE shall have 15 working days from receipt of the database to approve or comment. Within 15 days of receiving EIGE's comments, the Contractor will revise and resubmit the database.

Part B

Deliverable 9: Methodological approach for the identification of good practices in the area of female entrepreneurship

The contractor is expected to develop specific criteria to identify and assess practices with potential in the area of Women and Economy, with specific emphasis on in the context of female entrepreneurship.

Contractor is also requested to provide the methodological approach to present how practices will be assessed, which qualitative criteria will be adopted, how stakeholders will be involved, which tools will be used, how the team will be organised.

In the identification and collection of practices with potential, the contractor will have to adopt EIGE's approach to good practices, presented above.

The methodology should present the following features:

- which expertise will be used for the collection and identification;
- how the team will work, share tasks and roles;
- how the identification of practices will be developed;
- which qualitative criteria will be used for the assessment;
- how relevant stakeholders will be involved in the process of collection, identification and assessment;
- how it will be ensured that the collected practices reflect consistency and relevance with EU 2020 and the Commission Strategy for Equality between Women and Men 2010-2015;
- how the language issue will be managed

The contractor is requested to provide a specific proposal and template for the description of the practice.

Size: maximum 10 pages, including the proposal for the template of good practice.

Language: English (UK)

Deadline: Three weeks after the date of signature of the contract, the Contractor shall provide the deliverable to EIGE. EIGE will have 10 working days from receipt of the report to approve or comment. Within 10 days of receiving EIGE's comments, the Contractor shall submit additional information and the version in its definitive form by electronic and regular mail. The Contractor is expected to ensure smooth and efficient communication with EIGE, in case clarification regarding provided information is needed.

Deliverable 10: Literature review on female entrepreneurship

The literature review will consist of a national and European annotated bibliography in the area of Women and Economy, with specific focus on female entrepreneurship. It must include an assessment of existing documents (international, European and national) and an overview of relevant research and existing gaps, focusing in particular, but not exclusively, on networking, gender training and funding.
In particular, the review will collect grey literature and research, surveys, evaluations and monitoring reports (in electronic format).

Guidelines for the review will be provided by EIGE during inception meeting.

Document shall be MS Excel format (or compatible).

Size: at least 3 references per MS

Language: English (UK)

Deadline: 14 weeks after the date of signature of the contract the Contractor shall provide the deliverable to EIGE. EIGE will have 20 working days from receipt of the report to approve or comment. Within ten days of receiving EIGE's comments, the Contractor shall submit additional information and the version in its definitive form by electronic and regular mail. The Contractor is expected to ensure smooth and efficient communication with EIGE, in case clarification regarding provided information is needed.

Deliverable 11: Collection of nine good practices

The collection of good practices will present and describe the practices identified through the assessment process, developed by EIGE and the contractor, with the support of relevant stakeholders in the area of Women and the Economy, in the context of female entrepreneurship in EU Member States.

The good practices will be assessed within a consultation meeting, gathering experts and stakeholders, working in the area of female entrepreneurship.

The process is consistent with EIGE's approach to good practices and it will lead to the identification of nine effective examples.

Good Practices will:

- be referred to networking, gender training and funding;
- reflect the contribution provided by the assessment process among stakeholders;
- be updated with further data and information provided by the stakeholders during the assessment;
- be consistent with the structure proposed for the practices with potential.

The description of each practice shall include:

1. Context analysis, providing, where possible, existing and available information[20] on
    a. sustainability;
    b. impact;
    c. effectiveness;
    d. efficiency;
    e. relevance;
    f. policy and gender mainstreaming strategy in which the experience is framed;
    g. main gender gaps related to the development of the specific practice;
    h. EIGE's general criteria for good practices;
2. Period of implementation
3. Full presentation of the initiative, highlighting the relevance and coherence of the approach with the aims of EU 2020 and Strategy for Equality between Women and Men 2010-2015, in terms of economic independence
4. Aim of the practice, in terms of gender equality
5. Results achieved, in terms of advancement of gender equality and/or reduction of relevant gender gaps
6. Success factors

[20] The concepts adopted are consistent with the approach provided by European Commission. "Project Cycle Management Guidelines, Aid Delivery Methods". European Commission, 2004

7. Main obstacles
8. Lessons learnt
9. Contacts, links and bibliography

Document shall be in MS Word format (or compatible).

Size: maximum 35 pages, including the nine practices (max three pages for each fiche) and a paper introducing the whole methodological process and the tools and criteria used.

Language: English (UK)

Deadline: Thirty-five weeks after the date of signature of the contract, the Contractor shall provide the deliverable to EIGE. EIGE will have 10 working days from receipt of the report to approve or comment. Within ten days of receiving EIGE's comments, the Contractor shall submit additional information and the version in its definitive form by electronic and regular mail. The Contractor is expected to ensure smooth and efficient communication with EIGE, in case clarification regarding provided information is needed.

Deliverable 12: Factsheet of good practices in the context of female entrepreneurship

One Factsheet on good practices in the context of Women and Economy, complying with EIGE's style guide, will have to be delivered.

The factsheets will introduce information about effective tools and methods related to:

1. identified approaches to support economic independence through female entrepreneurship
2. facts and figures, provided by the work on good practices
3. European legislative and policy framework

Deadline: 36 weeks after the signature of the contract, the Contractor should provide the expected deliverables to EIGE.

Deliverable 13: Concise report on the benefits of gender equality in entrepreneurship

A brief report on the Benefits of Gender Equality in entrepreneurship will offer a broad reflection on the rationale and theoretical basis underpinning efforts to bring gender equality into entrepreneurship.

The report will be divided in several sections:

1. conceptual framework and key elements of policies fostering gender-equal entrepreneurship;
2. methodology to scope, map-out and collect evidence on the benefits of gender equality in entrepreneurship at various levels;
3. description of results of a scoping exercise on the benefits of gender equality and mapping out of main findings;
4. collection of evidence on some of the identified benefits of gender equal entrepreneurship at various levels and, specific analysis of ways in which the Benefits of gender equality in entrepreneurship contribute to strengthening the economic case of gender equality

5. main findings and conclusions
6. policy implications

Deadline: Thirty-eight weeks after the signature of the contract, the Contractor should provide the expected deliverables to EIGE.

EIGE will have 10 working days from receipt of the report to approve or comment. Within ten days of receiving EIGE's comments, the Contractor shall submit additional information and the version in its definitive form by electronic and regular mail. The Contractor is expected to ensure smooth and efficient communication with EIGE, in case clarification regarding provided information is needed.

1.7 PROVISIONAL TIMELINE

Milestone	Week
Inception meeting	W2
Inception Report	W3
Methodological approach for good practices	W3
Interim Report	W12
Interim meeting	W14
Literature review on female entrepreneurship	W14
Final Report	W22
Country sheets	W22
Database	W12 (preliminary); W22 (final)
Summary report	W29
Abstract	W29
Factsheets	W29
Set of good practices	W33
Factsheets on female entrepreneurship	W34
Concise report on the benefits of gender equality in entrepreneurship	W38

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 of professionals and may include further members if needed.

The team:

- must include a project manager;
- must include at least seven researchers; this group
  - must include at least four senior researchers:
  - must include at least five researchers in gender equality research;
  - must include at least two researchers in quantitative and/or qualitative data analysis and development of indicators;
  - must include one economist, with track record of analysis of gender policy issues;
- must include at least one statistician with at least five years of experience in data analysis in social statistics, preferably in gender equality;
- must include one editor with experience in arranging, writing, editing and overseeing the production of texts for publications.

<u>Project Manager</u>
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;
- proven experience in the area of gender equality;
- 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).

<u>Five researchers in gender equality</u>
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 (preferably with links to gender and economy);
- preferable experience on evaluation and assessment of projects; programmes and practices in the context of gender equality (preferably with links to gender and economy);
- excellent knowledge of English (Level C1 based on Europass CV model).

<u>Two researchers in data analysis</u>
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 data analysis and interpretation on gender equality issues (preferably with links to gender and economy);
- preferable experience in construction of indicators or other measurement tools;
- excellent knowledge of English (Level C1 based on Europass CV model).

<u>One statistician</u>
Qualifications and professional experience must include:

- university degree in statistics, mathematics or social sciences;
- 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 work with microdata and use of statistical software;
- excellent knowledge of English (Level C1 based on Europass CV model).

<u>One economist, with track-record on analysis of gender policy issues</u>
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 (preferably with links to gender and economy);
- excellent knowledge of English (Level C1 based on Europass CV model).

<u>One editor</u>
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 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.

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

- experience and knowledge of the European Union's policies and strategies on gender equality and their implementation at EU and Member State level, particularly with regard to gender and economy;
- experience and knowledge of the area of Women and Economy, specifically regarding female entrepreneurship;

- experience in comparative research related to institutional mechanisms and gender equality, either at EU level or Member State level;
- experience in working with statistical databases and data, including microdata;
- ability to assess the quality, measurability, reliability and comparability of data and interpretation of data;
- proven skills in collection and objective interpretation and analysis of data and information
- experience in the synthesis and analysis of large amounts of information;
- strong analytical and writing skills;
- experience in drafting analytical reports in a European context;
- very good command of English (UK);
- experience in editing reports.

1.10 COMMUNICATION

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

During the course of the contract period, and in addition to the inception meeting to be held at EIGE's premises in Vilnius, at least two more meetings are envisaged between the Contractor and representatives of EIGE. At the inception meeting, the objectives of the project will be discussed in detail, particularly the research methodology and the project timeline, as defined in the technical proposal submitted by the Contractor during the tendering process. At the mid-term meeting, the representatives of EIGE and the Contractor will discuss the Interim Report. At the final meeting, the findings of the study and the draft Final Report will be discussed. These meetings will serve as a platform to exchange information and project development in regard to quality control, and will supplement other communicated information. All meetings will take place in Vilnius at EIGE's premises.

The project manager and the senior researcher(s) shall attend all meetings.

All costs for participation at the above mentioned meetings are to be borne in full by the Contractor.

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

The Contractor is expected to ensure smooth and efficient communication with EIGE during the contract life-span and for six months after the end of the contract.

Contacts made with Member States to gather information should be fully documented and shared with EIGE. Full results of data collection should be made available to EIGE directly after the end of the data collection exercise.

1.11 MONITORING OF PROJECT IMPLEMENTATION

EIGE will monitor the project in technical and administrative terms. The Contractor shall report immediately, in writing, any problems encountered during the implementation of the contract to EIGE.

The Contractor shall 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.

2 THE TENDER

2.1 SUBMISSION OF THE TENDER

Participation in tendering procedures is open on equal terms to all natural and legal persons falling within the scope of the Treaties (this includes all economic operators registered in the EU and all EU citizens). Participation is also open to all natural and legal persons in any non-EU country which has an 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 parties to 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 tender invalid.

Submission of a tender implies that the Contractor accepts all the terms and conditions set out in these specifications (including the annexes and the technical specifications) and waives all other terms of business.

Submission of a tender binds the Contractor to whom the contract is awarded during performance of the contract. Once EIGE has accepted the tender, it shall become the property of the Institute that 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

30/04/2013 at 10:00 EET (Vilnius time)

at the following location:

European Institute for Gender Equality Gedimino prospektas 16 Vilnius, Lithuania LT-01103

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

Provided it has been requested in good time, such additional information will be supplied simultaneously to all economic operators by posting it onto EIGE web-site, Internet address http://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. Covering letter signed by the tenderer or his/her duly authorised representative

B. Table of contents

C. Five sections:

Section One: Administrative information,

Section Two: Documents related to the Exclusion criteria

Section Three: Documents related to the Selection criteria

Section Four: Technical 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

- Financial identification Form
  The original bank identification form must be filled in and signed by an authorised representative of the Tenderer and his/her bank. A standard form is available at:
  http://ec.europa.eu/budget/execution/ftiers_en.htm

The above forms must be accompanied by the evidence as indicated at the bottom of each form (f*or private entities*: proof of registration, VAT registration etc; *for individuals*: copy of passport, proof of registration/VAT if applicable; *for public entities*: official document on establishment etc).

Joint Offers

A joint tender is a situation where an offer is submitted by a group of tenderers (consortium). If awarded the contract, each member of the consortium will be jointly and severally liable towards EIGE for the performance of the contract.

A consortium can be a permanent, legally established grouping or a grouping which has been constituted for this tender procedure.

Consortia members in joint tenders may submit only one tender for a single contract. All members of the consortium shall sign the tender or one of the consortium members which is designated as the representative authorised to undertake commitments on its behalf (copy of the authorisation must be provided with the offer).

The tender must indicate which member (lead consortium partner) will represent the consortium in dealing with the contracting authority. The tender must describe the form the cooperation is to take in order to achieve the desired results and how technical, administrative and financial aspects will be organised.

If the tender does not mention that all members are jointly and severally liable, all other parties included in the tender than the party signing the tender (Tenderers) will be considered subcontractors.

In case of submission of a joint offer, the Tenderers are asked to provide an original of filled in and duly signed one of the attached Powers of attorney of the Standard Submission Forms depending on the set up that has been chosen by the Tenderers, and specify the role of the group, as well as who has been appointed by the others as the group leader.

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

Subcontracting

Subcontracting is the situation where the Contractor in order to implement the contract, enters into legal commitments with other legal or natural persons for performing part of the service (in particular, any work performed by a person who is not an employee of the tenderer will be considered as subcontracted). .

The Contractor shall remain bound by his obligations to EIGE and shall bear exclusive liability, sole and fully responsibility for the performance of the contract. EIGE has no direct legal relationship with the subcontractor(s).

If the Tenderer envisages subcontracting, the tender must include, using models in Standard Submission Forms:

- a subcontracting form by Tenderer clearly stating the roles, activities and responsibilities of the proposed subcontractor(s), and the reasons why subcontracting is envisaged;
- a letter of intent by each proposed subcontractor stating its intention to collaborate with the tender if the Tenderer wins the contract and their willingness to accept the tasks and the terms and conditions of the contract.

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

The main contractor retains full liability towards 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 document 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 him of the proposed award of the contract and preceding the signature of the contract, the following evidences confirming the statements referred to in the Declaration.

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

- 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.

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

<u>2.4.3. A. Economic and financial capacity</u>

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

The tenderer which according to the law of the country in which it is established is required to publish the balance sheet shall complete and include in the offer **a statement "Economic and financial capacity"** as presented in the Standard submission forms. Please observe the following aspects in completing this financial statement:

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.

The average annual turnover of the tenderer must be not lower then EUR 300.000 during the past 3 years.

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, 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 concerned with this contract and have a proven capacity to manage the administrative and financial aspects of such a contract;

– must demonstrate the capacity to liaise with the relevant parties in all Member States and at EU level;

– must demonstrate significant professional experience in a EU (or international) context, and, if needed, the capacity to rely on national competences and/or experiences to collect the necessary information for all 27 Member States;

– must demonstrate a high level of competency in written English.

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 by the following:

- Reference list (including contact details) of minimum 5 and maximum 15 current and past costumers to whom the Tenderer has supplied services related to tasks described under this tender, in the past 3 years; describing the provided services and specifying the Tenderer’s share in provision of the services.
- Samples of one to five EU and/or international projects implemented during last five years.
- Statement of the average annual workforce (only permanent staff) of the service provider broken down by management staff and research staff over the past 3 years.
- The Curricula Vitae (CVs), preferably in a common European format, of the proposed members of the team must be enclosed and must clearly show evidence of the experience and 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 which contains the tenderer's proposal to reach the objectives and fulfil the tasks described in Section 1.4 of these technical specifications, to establish and use the methodology as specified in Section 1.5 and to deliver high quality deliverables described in Section 1.6.

The technical proposal should refer to the award criteria described in section 3 and should enable their application during the assessment procedure.

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:

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

The maximum volume of the contract is estimated at **EUR 340.000,00** 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, or other costs relative to the deliverables.

The tenderer's attention is drawn to the following points:

- Prices must be quoted in euros.
- Prices should be quoted free of all duties, taxes and other charges e.g. free of VAT, as the European Institutions are exempt from such charges in the EU under Articles 3 and 4 of the protocol on the Privileges and Immunities of the European Union of 8 April 1965 (OJ L 152 of 13 July 1967). Exemption is granted to the agencies by the governments of the Member states, either through refunds upon presentation of documentary evidence or by direct exemption. For EIGE the Lithuanian national

legislation provides an exemption by means of a reimbursement. The amount of VAT is to be shown separately.

In case of doubt about the applicable VAT system, it is the tenderer's responsibility to contact the national authorities to clarify the way in which the European Union is exempted from VAT.

3 THE ASSESSMENT PROCEDURE

3.1 EVALUATION OF THE TENDERERS

Stage 1 - Application of exclusion criteria

The (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 the selection criteria established in the Tender Specifications. 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:

A.1 Methodological approach

The tenderer shall present the understanding of the assignment and its objectives and the context in which the assignment will be carried out.

The tenderer shall justify their proposed methodologies and must describe in detail their proposed approach(es) to provide foreseen deliverables. The choice must be well-grounded in established social science research methodologies. The tenderer should demonstrate experience of having used the chosen methodology in performing gender analysis.

Efficacy, efficiency and quality of the methodology and tools with regard to the proposed deliverables will be assessed. Appropriateness of application of methods for processing and interpretation of collected data will be assessed.

EIGE will furthermore assess to what extent the tenderer has identified the main issues of the context of implementation of the project, providing evidence of identifying main challenges, gaps and trends.

A.1.1 Methodology for literature and documentation review

Tenderers shall describe in detail their proposed methodology for literature and documentation review, including an overview of policy developments and review of research done on the main thematic aspects of this study. The tenderers must also describe how relevant sources and documentation will be identified.

For this criterion, the evaluation committee will assess the proposed methodologies for collecting, analysing and presenting the literature and documentation review for a background overview. The tenderers shall also address how the difficulties in the process, if any, will be tackled.

A.1.2 Methodology for the data collection, review and development of indicators

Tenderers shall describe in detail their proposed methodology for each of the following tasks: the collection and analysis of data on, but not limited to, employment, unemployment, part-time work, types of contracts, self-employment in EU Member States and Croatia using comparable data sources; the grid of analysis to be applied to the data collected; the development of a country sheets and development of the database. The tenderers should clearly explain the reasons for their specific methodological choice.

The presented methodology for data collection in the area of Women and the Economy and for development of indicators will be assessed.

Under this criterion the evaluation committee will assess the ability of the tenderer to propose a valid and clear methodological framework to implement a cost effective and well-performing solution for an effective implementation of tasks as defined by the technical specifications.

A.1.3 Methodology for good practices

Tenderers are expected to specifically explain the way they are going to identify and assess the good practices and how they are going to develop specific qualitative criteria for the identification of good practices within the context of Women and the Economy. In particular, tenderers should discuss monitoring the participation and access of women to decision-making, self-regulation and gender training.

A.1.4 Methodology for mapping-out, identifying and assessing the benefits of gender equality in entrepreneurship across the EU

Tenderers are expected to develop the conceptual basis for a definition and description of gender-equal entrepreneurship policies. Furthermore, they are expected to specifically explain the methodological approach that will be used for the mapping-out and identification of benefits of gender equality in entrepreneurship across the EU. In addition to that, tenderers shall explain the ways in which they will collect evidence of those identified benefits at various levels in relevant EU MS where successful gender equal entrepreneurship policies have been implemented.

Tenderers shall explain clearly how involvement of relevant stakeholders will be assured.

A.2 Project management, organisation of the project team and communication

The tenderer should provide a clear proposal presenting the project management (with specific reference to risk management, monitoring and evaluation). The project management proposal should outline the organisation and composition of the project team, making clear how proposed organisation and management structures will be used for the effective and timely implementation of this project. The tenderer has to describe how the coverage of all EU Member States will be ensured.

The tenderer's technical proposal should indicate clearly how the internal communication within the team and interaction with EIGE will be organised. The tenderers will also have to present a clear communication strategy, both internal among partners and external towards EIGE, identifying for each key role a responsible person.

Tenderers should present the approach adopted for quality assurance, with specific reference to the quality, relevance and coherence of the deliverables. The quality assurance approach should present also application of highest language standard.

A.3 Work plan and timeline

The tenderer should present in the technical proposal a detailed work plan, by weeks, clearly indicating key stages of the project, their duration and expected milestones. The work plan should be based on these technical specifications and should indicate how the project activities will be managed and implemented respecting the given time frame.

Tenderers should provide a detailed explanatory project timeline for each phase, indicating clearly the time to be devoted to each stage of the project whilst fully respecting the deadlines. The strategy and planning to match the expected delivery according the deadlines must be clearly explained.

The tenderers should clearly indicate which activities will be carried out in parallel and how the project team will manage this.

The presentation of the work plan and of the scheduling must be clearly connected to the project management and must emphasize risk assessment related to the delivery of the expected results.

For this criterion, the evaluation committee will assess the general management approach, including work organisation and the work plan proposed; whether the tenderer is following the set timeframe and preventing delays; the plan for risk management; the approach and method of coordination proposed to ensure contact with the experts involved; and coordinating and monitoring the quality of work.

The tenderer must present a clear, logical structure of planned activities. A short and precise presentation with tables and examples will be a distinct asset.

Criteria Nr.	**Criteria description**	**Maximum points per criteria**
1.	Methodological approach	**65**
2.	Project management, organisation of the project team and communication	**20**
3.	Work plan and timeline	**15**
Total		***100***

Tenders scored either below the minimum score (70%) required per criterion and below 70% out of total 100 points will be rejected and thus 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:

Final score for Tender = Technical score x 100.000 / 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 10 calendar days has elapsed, running from the day after the simultaneous dispatch of the award decisions and letters to unsuccessful tenderers.

3.3.4 EVIDENCE BY CONTRACTOR

The tenderer to whom the contract is to be awarded shall provide, within 15 days following the receipt of the letter informing him of the proposed award of the contract and preceding the signature of the contract, the evidence on exclusion criteria, defined in section 2.4.2. If this evidence is not provided or proved to be unsatisfactory, the Institute reserves the right to cancel the award procedure or to change the award decision to the benefit of the next best ranked tenderers on condition that s/he provides the evidence on exclusion.

3.3.5 NO OBLIGATION TO AWARD THE CONTRACT

The tendering procedure shall not involve 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 June 2013. The duration of the tasks shall not exceed **11 months**.

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

4.3 PLACE OF PERFORMANCE

The tasks will be performed on the Contractor's premises 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 **340.000,00 EUR,** excluding VAT. Any bid exceeding this amount will not be considered.

4.5 TERMS OF PAYMENT

Payments shall be made in accordance with Article 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.