



EIGE/2015/OPER/07

TENDER SPECIFICATIONS

Integrating Gender Equality into Research Performing Organisations RPO and university. Research, Practices and setting of on-line Tool on Gender Equality Plans

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.

CONTENTS:

1	TECHNICAL SPECIFICATIONS.....	3
1.1	GENERAL BACKGROUND	3
1.2	GENERAL AND SPECIFIC OBJECTIVES	8
1.3	TASKS	9
1.4	INPUT BY THE CONTRACTING AUTHORITY	24
1.5	INTERMEDIATE OUTPUTS AND DELIVERABLES	24
1.6	FINAL OUTPUT AND DELIVERABLE	25
1.7	GENERAL GUIDANCE ON METHODOLOGY	26
1.8	PERFORMANCE AND QUALITY REQUIREMENTS	28
1.9	GENERAL DELIVERY TIME AND PROGRESS MEETINGS	28
1.10	INTELLECTUAL PROPERTY RIGHTS.....	29
1.11	OPTIONAL CLAUSES	29
2	THE TENDER.....	30
2.1	SUBMISSION OF THE TENDER.....	30
2.2	OPENING OF TENDERS	30
2.3	CONTACTS WITH EIGE.....	31
2.4	CONTENT OF THE TENDER	31
2.4.1	SECTION ONE: ADMINISTRATIVE INFORMATION	32
2.4.2	SECTION TWO. EXCLUSION CRITERIA DOCUMENTATION	33
2.4.3	SECTION THREE: SELECTION CRITERIA DOCUMENTATION.....	34
2.4.4	SECTION FOUR: TECHNICAL OFFER	39
2.4.5	SECTION FIVE: FINANCIAL OFFER	40
3	THE ASSESSMENT PROCEDURE	41
3.1	EVALUATION OF THE TENDERERS	41
3.2	EVALUATION OF THE TENDERS	42
3.3	AWARD OF THE CONTRACT	44
3.3.1	<i>Award principle.....</i>	44
3.3.2	<i>Information to tenderers.....</i>	45
3.3.3	<i>Standstill period.....</i>	45
3.3.4	<i>Evidence by Contractor.....</i>	45
3.3.5	<i>No obligation to award the contract.....</i>	45
4	THE CONTRACT.....	46
4.1	NATURE OF THE CONTRACT	46
4.2	STARTING DATE OF THE CONTRACT AND DURATION OF THE TASKS	46
4.3	PLACE OF PERFORMANCE	46
4.4	VOLUME OF THE CONTRACT	46
4.5	TERMS OF PAYMENT.....	46
4.6	GUARANTEES	46
4.7	DATA PROTECTION	46

1 TECHNICAL SPECIFICATIONS

1.1 GENERAL BACKGROUND

The European Institute for Gender Equality (EIGE) was created by Regulation (EC) No 1922/2006 of the European Parliament and of the Council of 20 December 2006. The overall objectives or long-term effects of EIGE's work are defined in the Regulation as:

... "To contribute to and strengthen the promotion of gender equality including gender mainstreaming in all Community policies and the resulting national policies, and the fight against discrimination based on sex, and to raise EU citizens' awareness of gender equality."

The main tasks of the Institute are the dissemination of the collected and analysed comparable data on gender issues and the facilitation of the exchange of best practices and dialogue among stakeholders in order to raise awareness among EU citizens.

To contribute to the implementation of the above mentioned tasks, EIGE launches this call for tender with a goal to conclude a contract with a professional service provider.

EU policy context for gender mainstreaming in research area

Following the Amsterdam Treaty of 1999, which established equality between men and women as a specific task of the Community and as a horizontal objective affecting all Community tasks, the European Commission formalised its commitment to advance gender equality in research in its Communication 'Women and Science: mobilising women to enrich European research' (1999).

Specific measures are needed to address both the underrepresentation of women in Science and Innovation, the unbalanced participation of women in Science and Innovation decision-making, and the general lack of attention paid to gender differences within research.

The legal basis reference document for the Horizon 2020 Specific Programme¹ states: *"Promoting gender equality in science and innovation is a commitment of the Union. In Horizon 2020, gender will be addressed as a cross-cutting issue in order to rectify imbalances between women and men and to integrate a gender dimension in research and innovation programming and content."*

Three specific objectives are put forward in Horizon 2020:

- Gender balance in decision-making
- Gender balance in research teams at all levels
- Integration of the gender dimension in research and innovation content

The European Commission is committed to ensure 40% of the under-represented sex in all its expert groups, panels and committees and will continue to apply this under Horizon 2020.

Experts agree that there are two major types of limitations to gender equality in research. Firstly, the provisions of EU Directives on gender equality in the labour market are inadequately implemented, for instance at the level of recruitment and advancement of researchers' career, in working conditions and the management of career breaks. Secondly, gender inequalities in research practices which fall outside the EU Directives because of an absence of relevant employment relationships persist, for instance when it comes to

¹ http://ec.europa.eu/research/participants/data/ref/h2020/legal_basis/sp/h2020-sp_en.pdf (p. 10)

appointing members of decision-making bodies and the integration of the gender dimension in the content of research programmes².

In the ERA Communication "A Reinforced European Research Area Partnership for Excellence and Growth"³ of 2012 Member States are invited to create a legal and policy environment and provide incentives to:

- remove legal and other barriers to the recruitment, retention and career progression of female researchers while fully complying with EU law on gender equality;
- address gender imbalances in decision making processes;
- strengthen the gender dimension in research programmes.

Equally research stakeholder organisations are invited to implement institutional change relating to human resources management, funding, decision making and research programmes through Gender Equality Plans which aim to:

- conduct impact assessments / audits of procedures and practices to identify gender bias;
- implement innovative strategies to correct any bias;
- set targets and monitor progress via indicators.

The ERA Progress Report 2014⁴ reports that specific laws and/or national strategies on gender equality in public research have been adopted in over half of the EU Member States. The ERA Facts and Figures report⁵ which accompanies the ERA Progress Report 2014 shows significant correlations between measures taken at Research performing organizations (RPOs) level, including gender equality plans, and the existence of national laws, strategies and/or incentives to foster institutional change. The report also underlines the wide differences among countries and concludes that there is a need for more joined efforts and systemic strategy aiming at longer-term institutional change in the European research system.

The European Commission finances the creation of gender equality plans (GEPs) through projects under FP7 and Horizon2020. However, the latter funding covers only a small number of gender equality plans to be implemented in research institutions. Therefore, here is the need for a better elaborated mechanism which would multiply the setting up of GEPs across the Member States and within different research institutions.

Additionally, the inadequate implementation of EU Directives calls for awareness-raising among the Gender Equality Bodies and Ministries who deal with research. They need to be more involved in implementing GEPs in RPOs and universities.

The European Institute for Gender Equality (EIGE) in cooperation with DG RTD will develop an online competence building tool that offers practical guidance on how to set up and implement Gender Equality Plans in research institutions. This joint initiative will support the implementation of policy objectives taken at the EU level in the ERA and Horizon 2020. It will primarily be aimed at the Research Performing Organisations (RPOs) including universities in the EU-28 and associated countries.

EIGE's work on gender mainstreaming and competence development

Gender mainstreaming (GM) is a strategy used to integrate gender concerns into all policies and programmes of the European Union institutions and Member States. Within the European Union gender mainstreaming was firstly defined by the European Commission in 1996⁶ as: "(...) *mobilising all general*

² Gender dimension in research content means integrating sex and gender analysis into research. In other words, taking into account biological characteristics and social/cultural features of both women and men in R&I. It is an added-value in terms of innovation, creativity, excellence and returns on investments.

³ COM(2012) 392 final

⁴ COM(2014) 575 final

⁵ EUR26620 EN

⁶ COM(96) 67 final

policies and measures specifically for the purpose of achieving equality by actively and openly taking into account at the planning stage their possible effects on the respective situations of men and women (gender perspective)".

As laid down in the Article 3 of its founding Regulation, EIGE is designated to "(...) develop, analyse and disseminate methodological tools in order to support the integration of gender equality into all Community policies and the resulting national policies and to support gender mainstreaming in all community institutions and bodies".⁷

EIGE introduced its programme on gender mainstreaming in 2010. Based on Regulation (EC) 1922/2006⁸, the programme aims at supporting integration of gender in all EU and resulting national policies through development, analysis, evaluation and dissemination of methodological tools⁹. As gender mainstreaming is the responsibility of the governments, and is implemented by the civil servants, EIGE's gender mainstreaming programme is targeted primarily at policy makers and implementers from EU Member States and EU Institutions. The aim of EIGE's work is to support better informed policy making and a more effective implementation of gender mainstreaming in the EU. As a secondary target group EIGE's gender mainstreaming programme also addresses gender experts, researchers and civil society representatives involved in the development and implementation of gender equality policies.

Initially, since 2010, the programme was focused on the collection of information on gender mainstreaming, including tools, methods and good practices for implementation of gender mainstreaming with the purpose to map the situation in the EU with regard to the effective use of GM in support of gender equality. This first mapping phase will be finalised in 2015, when the web page on GM (Gender Mainstreaming Platform) will be fully operational and all collected information is made publicly accessible on-line.

The main focus of EIGE's gender mainstreaming work since 2014 has been offering support to the administrations in Member States and European Union institutions in translating gender mainstreaming concepts into concrete actions. This objective is being pursued through dissemination of information in the form of online practical materials on gender mainstreaming tailored to the needs of policy makers and implementers, placed on EIGE's online Gender Mainstreaming Platform. Currently, EIGE is finalising the technical solution for the platform and processing relevant information on gender mainstreaming by sectors and gender mainstreaming tools and methods.

EIGE's focus on competence development is a direct result of its work on gender equality training that has taken place in 2011-2013. EIGE's research on gender training in the EU suggests that one of the main reasons for a lack of gender mainstreaming success across the EU is insufficient gender equality knowledge of responsible staff. Even where general gender equality awareness is present, gender mainstreaming skills still need to be well improved to enable a more effective integration of gender concerns into all stages and all levels of policy making and implementation.

Specific focus on gender equality training at the EU and the Member States level helped EIGE realise that developing administrative and practical competence to formulate and eventually pursue gender equality goals in different kinds of organisations is often understated and not institutionalised. Even where gender equality training takes place it rarely brings desired results as raising awareness and improving gender mainstreaming skills and knowledge is rarely given strategic importance and is not regarded as an essential precondition for achieving gender equality goals. It is for this reason that the Institute, in addition to its role as a provider of reliable information on gender equality in the EU, set out to contribute to the development of gender equality competence across the different policy sectors.

Since 2014, EIGE concentrates on the development, implementation and promotion of a sectorial approach to gender mainstreaming. In practical terms, by making use of the knowledge generated in previous years by the Member States, in cooperation with the Commission and experts, EIGE will prepare a comprehensive package of information and capacity development tools in a selected policy area. The information will be presented on EIGE's Gender Mainstreaming Platform. EIGE plans to share the results of this work with the Member States - both gender mainstreaming infrastructures and ministries responsible for the selected

⁷ Regulation (EC) No 1922/2006 of the European Parliament and the Council of 20 December 2006 on establishing a European Institute for Gender Equality, Article 3, (b); <http://eige.europa.eu/content/document/establishing-regulation>

⁸ Ibid.

⁹ Ibid, Art. 4.

sector - through a guided participatory process format, supported by tailor made online materials - for their application and reflection.

In 2015, the policy area selected for this exercise is research and the aim of this procedure is to contribute to the production and dissemination of relevant materials in the framework of EIGE's sectorial approach to gender mainstreaming. Already in 2013, in the scope of the gender mainstreaming project accompanying the Lithuanian Presidency Report on Institutional Mechanisms for Gender Equality, EIGE has collected information on the policies and structures for integration of gender into the policy area of research. This year this information is to be expanded and presented on the online GM Platform.

EIGE's work on methods, tools and good practices

As an essential part of its gender mainstreaming work in 2011 EIGE initiated the collection and processing of tools, methods and good practices used by EU and Member States institutions for gender equality so as to identify and optimise the use of available resources across the European Union. The information has been foremost made available to the Member States' authorities in order to help them formulate policies and measures at local, regional and national level in their spheres of competence.

In line with the priorities of the Institute, all activities in the area of methods and tools have a primary focus on the collection of information to effectively feed into EIGE's Gender Mainstreaming Platform. The information and data will systematically present the resources collected at EU level as well at Member States level, among national institutions and organisations working on gender equality.

According to the Council of Europe, techniques and tools are defined as "*(...) groups or types of means to put the gender mainstreaming strategy into practice, i.e. to (re)organize, improve, develop and evaluate policy processes in order to incorporate a gender equality perspective.*"¹⁰

In the context of gender mainstreaming, the Council of Europe distinguishes between analytical tools (disaggregated statistics, surveys, indicators, etc.), educational tools (training, awareness-raising campaigns, manuals, follow-up action) and consultative and participatory tools (think tanks, databases, conferences, etc.). Educational tools and techniques are designed to raise awareness, to transfer knowledge, and to support training. Therefore, in order for policy makers and other professionals to deal with issues related to work life balance, quality of work and reconciliation of work, family and private life, for which they might not have the necessary expertise, there is a need for educational tools and methods.

The term 'Good practice in gender mainstreaming' should thereby refer to: "any experience/initiative displaying techniques, methods or approaches which function in a way, and produce effects and results coherent with the definition of gender mainstreaming, which are considered to be particularly effective in delivering gender mainstreaming as a transformative strategy, and, therefore, deserving to be disseminated and proposed to other organisational contexts"¹¹.

EIGE's defines "good practice" as an initiative that:

- has been working well (the practice is implemented, or at least shows substantial achievement provided by the practice itself);
- could be replicated elsewhere (is transferable);
- is good for learning how to think and act appropriately.

Two more criteria have been used, in order to support an evidence based approach for the collection of experiences, positively affecting gender equality. Firstly, the identified practice has to be embedded within a wider gender mainstreaming strategy. Furthermore, the practice has to show effective achievement in terms of advancement of gender equality.

¹⁰ Council of Europe, Gender mainstreaming. Conceptual framework, methodology and presentation of good practices. Final report of activities of the Group of Specialists on Mainstreaming (EG-S-MS) 2004

¹¹ Good Practices in Gender Mainstreaming, EIGE, 2011. http://eige.europa.eu/sites/default/files/Good-Practices-in-Gender-Mainstreaming-towards-effective-gender-training_0.pdf

EIGE labels certain practices as good through a thorough context analysis, which includes:

- The policy context of implementation;
- The institutional framework for gender equality;
- The funding available and addressed to policies and practices;
- The existence of relevant previous experiences;
- The operation of gender equality and women's networks in the area of research and innovation;
- Sex disaggregated data related to integration of gender equality into research and innovation;
- The coherence of the national policies to the main EU strategic policies (in particular EU2020, Strategy for gender equality 2010/2015 and specific directives)
- The consistency of the identified approaches to the qualitative criteria for the illustration of effective examples, to be developed within this project.

EIGE's guide on institutional transformation

While collecting and producing information on gender mainstreaming EIGE chooses to focus on some particular methods and tools. Organisational change, and even more specifically institutional transformation, was one of them.

Public organisations at the EU and Member State level play a crucial role in achieving gender equality as they formulate, implement and communicate relevant policies. Normally, because they are gendered social settings in themselves, public institutions do not act in a gender neutral way and they need to learn how to best take gender into account in regular rules, procedures and everyday practices.

With an aim of building the capacity of the administrations to take gender into account within their own organisations, EIGE has developed an online module on institutional transformation. The main part of the module focuses on guiding the institutions through necessary steps to achieve organisational change through effective integration of gender considerations. The guide is supported with background information and examples of transformative initiatives from all around the EU.

The guide suggests that public institutions follow the following steps to achieve transformative effects within organisations:

PREPARATION STAGE

- 1 Creating accountability and strengthening commitment
- 2 Allocating resources
- 3 Conducting an organisational analysis
- 4 Developing a gender mainstreaming strategy and a working plan

IMPLEMENTATION STAGE

- 5 Establishing a gender mainstreaming support structure
- 6 Setting gender equality objectives
- 7 Communicating gender mainstreaming
- 8 Introducing gender mainstreaming methods and tools
- 9 Developing gender equality competence
- 10 Establishing a gender information management system
- 11 Launching gender equality action plans
- 12 Promoting equal opportunities within the organisation's personnel

EVALUATION STAGE

- 13 Monitoring and steering organisational change

Although the Guide specifically addresses public institutions, EIGE considers that a similar approach would be applicable to organisations with different profiles, including research institutions. It is EIGE's position that organisational change needs to go beyond adoption of formal internal policies or organising gender equality

trainings. Institutional change requires acknowledgement that gender equality knowledge is a complex skill and the evolution of values towards more gender equality is a long process and requires a systematic and structured approach, practice and constant input.

Currently, the final technical adjustments are being made to the Guide before it is made available online through EIGE's Gender Mainstreaming Platform.

EIGE's Thematic Network on Gender Mainstreaming

To ensure productive cooperation with gender mainstreaming infrastructures in the Member States in 2014 EIGE has convened a Thematic Network on Gender Mainstreaming (TNGM). Initially, EIGE had been working with a Thematic Network on Gender Training that had a much more narrow focus and was convened to assist EIGE and to exchange information under the project on gender equality training. By initiating TNGM EIGE also set out to further build the capacity of gender machineries by encouraging cooperation and exchange between the Member States and providing a platform for peer-to-peer learning and discussion with the experts through various means.

Members of the network are appointed by the Member States' administrations and they are the civil servants dealing with gender mainstreaming matters in respective countries. The operation of the network is facilitated by EIGE's Gender Mainstreaming team by exchanging information and experience virtually and through physical meetings on matters related to gender mainstreaming. It is envisioned that the members of the network would be the core focal points in the Member States for EIGE while pursuing the sectorial approach to gender mainstreaming and thus attempts shall be made to effectively engage them in the planned processes and activities.

EIGE's online gender equality network – EuroGender

The European Network on Gender Equality (EuroGender)¹² was established as an online consultation and collaboration platform with an aim of exchanging resources, knowledge and good practices on gender equality. The platform currently has over 10000 registered users and it brings together decision-makers, practitioners, researchers and experts from all EU Member States and institutions.

Along with other functionalities EuroGender provides the possibility to host moderated online discussions on selected topics open to all users or among a limited number of participants. The platform has been used a number of times to bring the different stakeholders together, primarily to discuss the questions related to gender equality training, the practices of it and possible ways to advance the effectiveness of gender equality competence development.

EuroGender as an online platform shall be used for the purposes of this tender as well.

1.2 GENERAL AND SPECIFIC OBJECTIVES

The **general objective** of the project is to enhance gender equality in the EU policy area of research by providing policy makers with information on implementing gender sensitive policies in research institutions and by supporting research institutions with sound methodological guidelines for mainstreaming gender in administration, achieving structural transformation, including the change of organisational culture.

The **specific objective** is to develop an online tool for competence development on the implementation of gender equality plans in research institutions. The tool would specifically:

- Rely on the need to effectively implement EU Directives on gender equality in the labour market in Research Performing Organisations (RPOs) and universities ;
- Explain the importance of institutional transformation for RPOs and universities as an essential element of gender mainstreaming;

¹² More information on EuroGender at <http://eurogender.eige.europa.eu/join-european-network-gender-equality-short-eurogender>

Integrating Gender Equality into Research Performing Organisations RPO and university.
Research, Practices and setting of on-line Tool on Gender Equality Plans

- Put forward steps for a systematic implementation and monitoring of gender mainstreaming in RPOs and universities;
- Provide possibilities to improve the knowledge of the management, researchers, academics and human resources staff on tools and methods aimed at mainstreaming gender within their organisations customised to the needs of RPOs and universities.

1.3 TASKS

The contract aims to provide methodological guidelines on how to effectively take account of gender equality in Research Performing Organisations and universities.

Scope of the contract

Under the contract, the work shall commence with the identification and analysis of existing frameworks and practices that will serve as the basis for the development of the online tool.

The project shall cover, but not be limited to the following questions:

- Which currently implemented or planned national and EU policies are the most relevant in terms of providing a political and financial framework to institutional change of RPOs and universities?
- What are the main experiences, tools and trends in the European Union related to the gender sensitive institutional changes of RPOs and universities?
- What are the most relevant initiatives on Gender Equality Plans for RPOs and universities in the EU that would provide a learning value and be potentially transferable to other contexts?
- What are the documented benefits of the integration of gender mainstreaming at a preparation, implementation and evaluation stage into RPOs and universities?
- Which are the key factors that allow the effective integration of gender equality at a preparation, implementation and evaluation stage into RPOs and universities?
- Which existing tools are most suitable to support RPOs and universities in integrating gender mainstreaming?
- What are the most relevant challenges and gaps for policy makers to be addressed as to provide the necessary political support to the integration of gender mainstreaming into research institutions?
- What are the needs of the target audience of this online tool?

Additionally, the study shall identify, analyse and make use of planning, monitoring, auditing and evaluation tools that have worked best so far. It shall also map and analyse the developments and experiences in the EU and its Member States related to the institutional transformation in research institutions from a gender equality perspective. In particular the study shall analyse the existing experiences and strategies aimed at:

- Removing institutional obstacles to women's professional career;
- Increasing gender balance in decision making bodies in RPOs and universities;
- Introducing gender sensitive auditing, gender analysis and monitoring and evaluation tools in RPOs and universities;
- Building gender equality competence among managers and other staff in RPOs and universities;
- Enhancing women's career development;
- Modernising the organisational culture by making RPOs and universities more gender-aware.

The study will analyse existing instruments to support the gender sensitive structural transformation of RPOs and universities, within their decision-making processes, organisational practices, human resources management and the overall setting of working environment as well as the pursuit of excellence through greater diversity and gender equality. It will collect the existing knowledge about effective features to support the integration of gender equality in RPOs and universities. It will moreover develop analysis of the most relevant and transferrable approaches suitable to build guidance and exemplary tools to support research institutions in their process of transformation towards more gender sensitive organisational infrastructure and culture. The analysis will concern the phases of the institutional change – planning, implementation and evaluation – and the essential features of institutional transformation¹³ in research institutions. It will also be supported by the identification of good practices on institutional transformation and cultural modernization in research institutions.

Good practices will be identified among approaches, policies and practices that have proven to be effective in enhancing gender equality into the organisational infrastructure of research institutions. The identification process will be consistent with EIGE's work on institutional transformation and on good practices and it will be implemented by involving relevant stakeholders in the assessment exercise.

The tenderers shall analyse relevant literature, policies, programmes and projects developed in the period 2010-2015, in all EU Member States and at a European Union level. The background information collected for the project should also focus on the evidence and the benefits deriving by implementing gender mainstreaming practices in research institutions, both at a level of policies and at a level of planning and implementation, in EU Member States.

The online competence development tool, based on the initial analysis described above, shall offer practical guidance on how to set up and implement Gender Equality Plans in RPOs and universities. This shall be done by presenting theoretical and practical information on institutional change, making use of the good examples identified during the project.

The online tool shall be customised to the needs of RPOs and universities. Particular attention should be given to using appropriate wording, concepts and references to issues relevant to RPOs and universities. The tool shall be developed as to enhance gender equality competence of the policy makers, HR staff, and researchers and academics with management responsibilities in RPOs and universities. With an aim of being practical and easy to use the tool shall provide clear guidance by identifying and explaining the different steps of the process, including how to set up, implement, monitor and assess a Gender Equality Plan within RPO or a university.

Information about the ready-made tool shall be disseminated to RPOs and universities in the European Union and associated countries; to the community of Horizon 2020 and to the governments of the EU Member States, in particular gender mainstreaming infrastructures and ministries responsible for research.

Throughout the development process of the online tool, the contractor shall also:

1. Thoroughly analyse the target audience's needs and take them into account;
2. Take into account EIGE's framework and requirements with regard to the structure, navigation and technical implementation of the online tool;
3. Ensure multiple cycles of testing and feedback before the tool is published online.

¹³ Structural change in research institutions: Enhancing excellence, gender equality and efficiency in research and innovation, 2012, European Commission

Expected results

RESULT N. 1
EFFECTIVE CONSULTATION PROCESS IMPLEMENTED AND PROJECT WELL PLANNED

1	Activity	Deliverable
1.1	Organisation and Participation in the Inception meeting	D1 Inception report
1.2	Consultations with the experts	D2 Report of the Experts' Group meeting including information on existing policies, programmes and projects related to the integration of gender mainstreaming into research institutions

ACTIVITY 1.1: Finalising the Inception phase

The contractor is expected to:

- Participate to the inception meeting in Vilnius, to discuss the Technical Specifications and the Contractor's offer. The goal of the meeting is to clarify outstanding issues as may be necessary for carrying out the contract and for the good implementation of the project;
- Agree on a detailed methodology for each foreseen activity and share concrete information about project team;
- Introduce a draft design and planning of the communication strategy, to outline ways in which the project results will be communicated to the target audiences in an effective and timely manner in the end of the project and throughout the project. The strategy shall take into account EIGE's regulatory framework, the objectives of the project and the interests and needs of specific segments of the target group. The strategy shall specify the addresses of communication propose main messages and provide a timeline for communication. The final Communication Plan will be delivered later on, according to the planned tasks and deliverables.
- Deliver an inception report.

Deliverable 1: Inception report

The inception report will present the updated methodological approach, organisation of work, planning and timeline for all activities of the project within the contractual deadline, information on the team members and their contact details. The report must incorporate the decisions made during the inception meeting. The minutes of the meeting, drafted by the Contractor, shall be an integral part of the Inception report.

Size of the report: min 10 max 15 pages plus annexes

Deadline: After 2 weeks from the signature of the contract, the Contractor shall prepare an Inception report summarising the elements mentioned above and submit it to EIGE within five (5) working days after the inception meeting.

EIGE shall have five (5) working days from receipt to approve or comment on the report. The contractor shall have five (5) working days from receiving EIGE's feedback to address the comments and present the final version of Inception report.

ACTIVITY 1.2: Organising a consultation meeting with the experts

Under this activity the contractor shall organise a 1 day meeting in Vilnius. The expected number of participants is up to 15 experts, DG RTD representative and EIGE's staff (3 people).

Travel and accommodation costs for participants will be paid by the contractor, under the budget of this contract.

The aim of this meeting is to consult the relevant stakeholders – programme and project managers, coordinators and evaluators, networks - in order to reflect on main issues, experiences and challenges related to the integration of gender in research institutions.

The meeting will be focused on the specific aim to develop a tool to support research institution to integrate gender mainstreaming in the planning cycle and to promote institutional change.

The expert group will be consulted throughout the whole project, to ensure quality and relevance of results and outcomes.

- The contractor is expected to:
 - Develop the concept note of the meeting that would:
 - detail the objectives of the meeting and propose ways to achieve them;
 - propose a preliminary agenda;
 - propose a list of invitees and how they would be identified;
 - Propose the procedure of how the contribution of the experts will be integrated in the deliverable
 - Develop a thematic background paper that would:
 - provide a review of main policy initiatives implemented in EU Member States to facilitate gender mainstreaming in RPOs and universities ;
 - provide a context overview and analysis of the main initiatives and policies developed and ongoing in EU and in MS and related to the integration of gender mainstreaming into RPOs and universities.
 - Provide a desk review on the integration of gender equality in RPOs and universities, for the period 2010-2015, before the meeting

Deliverable 2: Report of the Expert Group meeting

- The contractor shall prepare a report of the consultation meeting. The report shall reflect on the issues discussed; list the practices/initiatives presented; outline the main results and challenges identified with regard to implementation of gender mainstreaming in research institutions; list conclusions and provide recommendations with regard to further execution of EIGE's project.

Size of the report: min 8 max 15 pages (plus annexes, if any)

Deadline: After 7 weeks from the signature of the contract, the Contractor should provide the deliverable to EIGE.

EIGE shall have five (5) working days from receipt of the report to comment on it or approve. Within five (5) working days from receiving EIGE's comments, the Contractor shall submit additional information and the final deliverable in definitive form.

RESULTS N. 2**COMPREHENSIVE OVERVIEW AND ANALYSIS OF EXISTING POLICIES, PROGRAMMES AND INITIATIVES OF GM IN RESEARCH INSTITUTIONS IN THE EU**

2	Activity	Deliverable
2.1	Analysing policies, programmes and initiatives on gender mainstreaming in research institutions in the EU	D3 Analytical paper
2.2	Organising an online discussion on EuroGender	D4 Report of the online discussion
2.3	Identification of relevant examples of GM in research institutions	D5 Collection of examples
2.4	Studying the positive impact of gender mainstreaming in research institutions	D6 Opinion paper on the positive impact of gender mainstreaming in research institutions
2.5	Organising a Peer Review meeting	D7 Report of the Peer Review meeting
2.6	Reporting on the progress of the project	D8 Interim Report

ACTIVITY 2.1: Analysing policies, programmes and initiatives on gender mainstreaming in research institutions

The contractor is expected to:

- Analyse the contributions coming from the consultation among key stakeholders and networks, working on the topic of the present project;
- Analyse the main policy developments at EU level to support institutional change in research institutions from a gender equality perspective;
- Identify the most effective tools and features to support research institutions to enhance gender equality by developing and implementing gender mainstreaming planning;
- Provide recommendations as to how the collected information and insights about the EU and national contexts should be used when developing the online tool on gender mainstreaming in research institutions.
- Map the main stakeholders in the area, including policy makers in the EU and the Member States, project managers and partners of relevant initiatives as well as evaluators of current initiatives.

Deliverable 3: Analytical paper on policies, programmes and initiatives related to the integration of gender mainstreaming into research institutions

The paper shall provide analysis of the priorities and initiatives on gender mainstreaming in research institutions. The analysis shall take into account the European Commission's "She figures" data as well as the information and data collected by EIGE in 2013 on the integration of gender into governmental research policies and by bodies responsible for research. The analysis shall also aim to identify the main gaps and challenges as well as the different priorities set at national and EU level. The contractor shall provide an updated overview of the existing policies, programming documents and action plans related to the integration of gender in research, at a national and at a European level.

Integrating Gender Equality into Research Performing Organisations RPO and university.
Research, Practices and setting of on-line Tool on Gender Equality Plans

The paper will highlight the convergence and consistency with the EU specific policies in the area of research and it is expected to present how practices implemented at national level into RPO's and Universities are consistent and coherent with the policy priorities and recommendations set by EU funding programmes on research and innovation.

The contractor shall look into the tools and approaches that have already been developed and are being put in practice to mainstream gender in research institutions that have been a part of most recent initiatives in the field. : When presenting the initiatives the contractor shall pay attention to

- Contextual features;
- Tools;
- Phases divided in:
 - Planning
 - Implementation
 - Evaluation
- Success factors;
- Risk factors;
- Main challenges and gaps;

The analysis shall serve in the most effective way for the development of the online tool by directing its conceptual solution, contents and methodological approach.

Size of the report: min 15 max 30 pages (plus annexes with updated Country Specific Information)

Deadline: 17 weeks after the signature of the contract.

EIGE shall have five (5) working days from receipt to approve or comment on the report. Within five (5) working days from receiving EIGE's comments, the Contractor will submit additional information.

ACTIVITY 2.2: Organising an online discussion

The contractor is expected to:

- Prepare and organise an online discussion on EuroGender, including:
 - formulation of specific objectives of the online discussion that would serve the aims of the whole project in the most effective way;
 - identification of invitees, including the VIP experts, and a facilitator of the discussion and management of invitation process;
 - cooperation with EIGE's colleague responsible for administration of EuroGender;
 - developing an agenda and a storyboard for the online discussion, including the relevant questions to be put forward for discussion;
 - ensuring any needed support to the participants on the day of the discussion.
- Prepare a structured report, presenting issues discussed, main contributions and conclusions.

Deliverable 4: Report of the online discussion

The objective of the report is to reflect on the main issues discussed during the online discussion, collect the most relevant quotes and insights, outline the gaps or challenges identified by the participants, list the conclusions and recommendations relevant for EIGE's future work on gender mainstreaming in research institutions.

- The report shall be consistent with EIGE's previous reports from the online discussions.

Size of the report: min 5 max 8 pages (plus annexes, if any)

Deadline: within 21 weeks after the signature of the contract, the Contractor should provide the deliverable to EIGE.

EIGE shall have 5 (five) working days from receipt of the report to comment on it or approve. Within five (5) working days from receiving EIGE's comments, the Contractor shall submit additional information.

ACTIVITY 2.3: Identification of the relevant examples of gender mainstreaming in research institutions

The contractor is expected to:

- Identify examples on the effective integration of gender in research institutions that aim at institutional changes in the stages of planning, implementation and evaluation.
- **Taking into account EIGE's approach on good practices (explained in more detail in the Background information of these Technical Specifications), suggest and follow a methodology to identify relevant examples on gender mainstreaming in research institutions;**
- Formulate specific qualitative criteria and features of the collected practices, as basis for the evidence of their positive impact. The criteria and the main features should be reflected in the design online tool;
- Provide suggestions on how to use the collected information in the most effective way for the development of the online tool.

Integrating Gender Equality into Research Performing Organisations RPO and university.
Research, Practices and setting of on-line Tool on Gender Equality Plans

Deliverable 5: Collection of examples

The **accountable and relevant examples** will have to be presented according EIGE's template (attached).

	Section	Notes	Approx. length (words)
1	Name of project		
2	Years of start & end		
3	Headline	Striking	
4	Summary	Approx. 1/5th of case length	300
5	Main text	Broken up by striking crossheads Approximate order depending on information available: Context analysis problem addressed description of action, including obstacles and how overcome results achievements	1,500
6	Contact	Name, organisation, address, telephone, e-mail (as available)	
7	Further information	links to websites: the project itself selected organisations involved selected scholarly or media articles evaluation, surveys	

The examples will have to include the following features:

- Specific qualitative criteria emerging from the identification of approaches on integrating gender equality in RPOs and universities;
- Concise note to explain and describe how the criteria were developed and identified.

Size: Example fiches and concise note (4/6 pages)

Deadline: After 22 weeks from the signature of the contract,

EIGE shall have ten (10) working days from receipt to approve or comment on the report. Within five (5) working days from receiving EIGE's comments, the Contractor will submit additional information.

ACTIVITY 2.4: Studying the positive impact of gender mainstreaming in research institutions

The contractor is expected to:

- Having proposed and agreed on the methodological approach, explore the available qualitative or quantitative evidence and provide a concise report on the positive impact of gender mainstreaming in research institutions.

Integrating Gender Equality into Research Performing Organisations RPO and university.
Research, Practices and setting of on-line Tool on Gender Equality Plans

Provide suggestions on how to use the collected information in the most effective way for the development of the online tool.

Deliverable 6: Opinion paper on the positive impact of gender mainstreaming in research institutions.

The paper shall highlight the following issues:

- Political relevance of the integration of gender in research institutions and related policy implications;
- Transformative potential of gender mainstreaming in research institutions;
- Conclusions and ways forward.

Size of the report: min 7 max 10 pages

Deadline: within 24 weeks after the signature of the contract, the Contractor should provide the deliverable to EIGE.

EIGE shall have ten (10) working days from receipt of the report to comment on it or approve. Within five (5) working days from receiving EIGE's comments, the Contractor shall submit additional information.

ACTIVITY 2.5: Organising a Peer Review meeting

The purpose of the meeting is to reflect and discuss about the collected examples, in order to share different experiences and lessons learnt, obstacles and success factors and to agree on main features on how to support the integration of gender equality into research institutions.

Travel and accommodation costs for participants will be paid by the contractor, under the budget of this contract.

The contractor is expected to:

- Present the interim findings of the study, in particular:
 - Approaches on the integration of gender equality into research institutions;
 - Qualitative criteria for the identification of effective examples related to the support of gender equality in research institutions;
 - Opinion paper on positive impact of integration of gender equality into research institutions;
 - Structure and content of the online tool.
- Identify the most relevant stakeholders for the exchange event. The expected audience is 25 people, with specific expertise and knowledge on institutional transformation of research institutions and gender equality plus expert from EIGE's Thematic Network on Gender Mainstreaming.
- Provide the report of the peer review meeting;
- Provide suggestions on how to use the collected information and contributions done by the participants of the meeting in the most effective way for the development of the online tool.

Deliverable 7: Report of the peer review

The report shall cover the following issues:

- participants;
- issues discussed;
- main contributions and findings;
- main challenges identified;
- outcomes, conclusions and recommendations.

Size of the report: min 10 max 15 pages (plus annexes)

Deadline: within 24 weeks after the signature of the contract, the Contractor should provide the deliverable to EIGE.

EIGE shall have ten (10) working days from receipt of the report to comment on it or approve. Within five (5) working days from receiving EIGE's comments, the Contractor shall submit additional information and the final deliverable in definitive form.

ACTIVITY 2.6: Delivering the Interim Report

The contractor is expected to:

- Provide a comprehensive overview of the implementation of the study, so far;
- Participate to the interim meeting, in Vilnius;

Send the report, at least 5 working days in advance, to EIGE's project manager.

Deliverable 8: Interim Report

The Interim report shall present the work in progress, including:

- the problems encountered, if any, and proposed solutions
- An updated work plan that would ensure the submission of further deliverables within the contractual deadlines.
- A proposal on the contents and format of 2 different online factsheets on gender mainstreaming in research institutions.
- The draft design, content and navigation of the online tool;
- The development of draft content of the modules of the online tool.

Size of the report: min 15 max 25 pages and the following annexes:

1. Analytical paper of main initiatives related to the integration of gender mainstreaming into research institutions
2. Report of the online discussion
3. Collection of examples

Integrating Gender Equality into Research Performing Organisations RPO and university.
Research, Practices and setting of on-line Tool on Gender Equality Plans

4. Opinion paper on the benefits of gender mainstreaming research institutions
5. Report of the Peer Review meeting

Deadline: 24 weeks after the signature of the contract, the Contractor should provide the Interim report and the other deliverables to EIGE and to participate in the first interim meeting in Vilnius.

EIGE shall have ten (10) working days from receipt of the report to comment on it or approve. Within five (5) working days from receiving EIGE's comments, the Contractor shall submit additional information and the final deliverable in definitive form.

RESULTS N. 3

ONLINE TOOL ON GENDER MAINSTREAMING IN RESEARCH INSTITUTIONS DEVELOPED AND DISSEMINATED

3	Activity	Deliverable
3.1	Developing the online tool on gender mainstreaming in research institutions	D9 Online tool
3.2	Communicating project results	D10 Learning seminar
		D11 Factsheets
		D12 Communication strategy
		D13 Executive Summary
		D14 Final report

ACTIVITY 3.1: Developing the online tool on gender equality plans in research institutions

The contractor is expected to:

- Specify the concept for the online tool on gender equality plans in research institutions, taking into account the target groups' needs analysis, the results of the performed overview of the policies, programmes and initiatives, the consultation process with the experts and EIGE's requirements. The concept shall include concrete proposals on the structure, contents, necessary elements, other necessary features.
- Ensure an adequate quality assurance and validation process;
- Ensure user-friendliness of the online tool;
- Produce a graphical design of the online tool;
- Develop a technical solution and integrate the online tool on EIGE's website in cooperation with responsible staff at EIGE.
- Test the usability and functionality of the tool.

Deliverable 9: Online tool

The online tool shall aim to develop the gender equality competence of the target group. It shall offer practical guidance on how to set up and implement Gender Equality Plans in RPOs and universities by providing theoretical information on institutional change and practical examples (good practices) based on the mapped initiatives.

The online tool shall be customised to the needs and awareness levels of RPOs and universities.

Among other issues the tool shall provide:

1. Background information (including concepts of institutional transformation, specificity of research institutions, benefits, dealing with resistance, additional material);
2. A guide to institutional change in research institutions taking into consideration the collected relevant information and expert's contributions as well as the steps proposed in EIGE's Guide on institutional transformation (as described in Chapter 1 of these Technical Specifications).
3. Relevant examples collected throughout the project.

The online tool shall be enriched with additional features, such as infographics, interviews, videos, access to existing resources (e.g. guidelines examples, checklists) or relevant stakeholders. The contractor shall develop an online video-tutorial to ensure effective navigation through different modules of the tool.

The contractor shall provide a technical solution for the tool where the online tool has to:

- be easy to use;
- be consistent with the style and structure of EIGE's online platform on gender mainstreaming;
- be hosted on EIGE's web servers in Drupal 7, utilising EIGE's software and hardware to the maximum degree;
- comply with the Web Content Accessibility Guidelines 2.0, level AA to the maximum degree. In case it is not possible to apply a guideline, a specific explanation should be provided to EIGE;
- be supported by all current major browsers (Internet Explorer, Safari, Chrome, Mozilla, Opera);
- respond when JavaScript is disabled. In any case, the data and metadata should be presented to the user in one format at least;
- help people with disabilities to perceive, understand, navigate and interact with it. The 10 golden rules in accessible web design http://ec.europa.eu/ipg/standards/accessibility/10_rules/index_en.htm should be applied to the maximum degree. In case this is not possible to apply a rule, a specific explanation should be provided to EIGE;
- adapt the layout of the content to the viewing environment/device (be web responsive);
- follow the good practices for search engine optimisation, including the guidelines provided at the Information Providers Guide (http://ec.europa.eu/ipg/content/optimise/seo/index_en.htm)
- allow extraction of information in various formats to be identified as useful during the needs analysis phase (e.g. csv, xls, pdf).

Deadline: within 44 weeks after the signature of the contract, the Contractor should provide the final version of the deliverable to EIGE. Draft versions should be provided before the final version, in a schedule that will allow multiple feedback cycles.

EIGE shall have fifteen (15) working days from receipt of the report to comment on it or approve. Within seven (7) working days from receiving EIGE's comments, the Contractor shall submit additional information and the final deliverable in definitive form.

ACTIVITY 3.2: Communicating project results

The contractor is expected to:

- Support EIGE in disseminating the project results by:
 - Developing and disseminating 2 online factsheets;
 - Developing communication messages customised to different segments of the target audience;
 - Communicating relevant information to the target audiences by e-mail or other communication means.
 - Collect feedback and reflections on the relevance, usability and consistence of the online tool and eventually integrate the comments into the tool, when delivering the final report.
 - Ensure, in order to have the validation of the tool and the approval of the final report of the project, that all requested changes have been introduced.
 - Update and introduce the requested changes, in the online tool, before submitting the final report.
 - Ensure full and free access to the online tool at EIGE, at any time and without any restriction.

Deliverable 10: Learning & Dissemination seminar (Brussels)

As for the Learning seminar, the contractor will be in charge of preparing:

- Background information on the issue of gender equality in research;
- Concept note of the event, introducing the main results of the study;
- Identification of main institutional stakeholders
 - expected audience is 50 people;
 - policy makers and representatives from national institutions responsible for research;
 - list of forthcoming event in which promote and disseminate the results of the project and the online tool;
- Identification – in cooperation with EIGE – of key note speakers (3);
- Sending “save the date” to identified stakeholders, to raise awareness about the event;
- Travel, accommodation and catering arrangements
- Report from the event.

The event represents the learning and dissemination event, to illustrate the online tool and to promote capacity building among key institutional stakeholders working on research, at policy level.

Travel and accommodation costs for participants will be paid by the contractor, under the budget of this contract.

The seminar is supposed to:

- raise awareness about the benefit of gender equality and institutional change in the area of research;
- support the effective integration of gender equality into research institutions;
- disseminate communication messages and information about the online tool to enhance knowledge of management, researchers, academics and human resources staff from RPOs and universities on how to mainstreaming gender equality within their organisations.
- Shall assure wide use of the online tool

Deadline: within 48 weeks after the signature of the contract, the Contractor should be able to organise the learning seminar.

EIGE shall have 15 working days from receipt of the draft plan to comment on it or approve. Within 10 working days from receiving EIGE's comments, the Contractor shall submit additional information and the final deliverable in definitive form.

Deliverable 11: 2 Factsheets on integration of gender equality into research institutions

- The contractor is expected to develop 2 factsheets on two focus areas as suggested by the contractor in the Interim report and approved by EIGE. The factsheets shall be reader-friendly and written in an attractive, simple to understand form and language and aim at a wide audience. The contractor

Size of the report: min 2 max 4 pages

Deadline: 50 weeks after the signature of the contract, the Contractor should provide the expected deliverables to EIGE.

EIGE shall have ten (10) working days from receipt of the report to comment on it or approve. Within five (5) working days from receiving EIGE's comments, the Contractor shall submit additional information and the final deliverable.

The contractor is expected to:

- Provide a comprehensive overview of the implementation of the project, so far;
- Send the reports, at least 10 working days in advance, to EIGE's project manager.

Deliverable 12: Communication strategy

The aim of such communication strategy is to outline ways in which the project results will be communicated to the target audiences in an effective and timely manner in the end of the project, and throughout the project, where considered necessary. The strategy shall take into account EIGE's regulatory framework, the objectives of the project and the interests and needs of specific segments of the target group.

The strategy shall specify the addressees of communication propose main messages and provide a timeline for communication.

Deadline: 52 weeks after the signature of the contract, the Contractor should provide the expected deliverables to EIGE.

EIGE shall have ten (10) working days from receipt of the report to comment on it or approve. Within five (5) working days from receiving EIGE's comments, the Contractor shall submit additional information and the final deliverable in definitive form.

Deliverable 13: Executive summary

The Executive summary will outline the main findings in a concise format and will be developed for wider dissemination of outcome of the results of the study.

The summary should bring together the key elements of the main report in a reader friendly format with appropriate layout, making as much as possible use of graphic elements, such as text boxes, graphics, photos, etc. to enhance readability and maximizing impact.

The document will be used as the basis for a further EIGE's publication, presenting the "Main Findings" achieved by EIGE's work within the area of gender mainstreaming.

Size of the report: min 10 max 15 pages (plus annexes)

Deadline: 60 weeks after the signature of the contract, the Contractor should provide the expected deliverables to EIGE.

EIGE shall have fifteen (15) working days from receipt of the report to comment on it or approve. Within seven (7) working days from receiving EIGE's comments, the Contractor shall submit additional information and the final deliverable in definitive form.

Deliverable 14: Final report

The Final report should be in line with the methodology proposed and agreed by EIGE during the inception meeting and documented in the inception report.

The report shall respond to the objectives as set out and be in line with other agreements between EIGE and the Contractor.

Statements, conclusions, recommendations and communication messages provided in the report shall be substantiated, clear and explicit, in line with EIGE's guidelines.

The report shall include:

- Detailed description of the main objectives of the project;
- A clear and accurate description of the methodology used;
- Description of the materials and sources used for the background analysis of the project, including the literature review;
- An overview of conclusions from the different meetings;
- Conclusions in line with what has been agreed in the inception report;
- Updated list of main stakeholders identified during the project, as the platform for further dissemination and follow-up;
- Updated list of forthcoming events, in EU level and in EU Member States, related to the topic of the project as context for further dissemination.

Size of the report: min 10 max 15 pages plus following Annexes:

1. Online tool (structure and design)
2. Report of the Learning Seminar
3. Executive Summary

Deadline: 60 weeks after the signature of the contract, the Contractor should provide the expected deliverables to EIGE.

EIGE shall have fifteen (15) working days from receipt of the report to comment on it or approve. Within seven (7) working days from receiving EIGE's comments, the Contractor shall submit additional information and the final deliverable in definitive form.

1.4 INPUT BY THE CONTRACTING AUTHORITY

EIGE will work closely together with the contractor, in order to provide timely all information necessary to effectively implement the foreseen tasks and to develop deliverables consistent with EIGE's qualitative and style standards.

In particular, EIGE will support the contractor, by sharing information about:

- EIGE's pool of stakeholders;
- EIGE resources and findings on similar studies and tools;
- EIGE's templates;
- EIGE's web infrastructures (web, EuroGender);
- Access to EIGE's website with the access rights that will be necessary to perform the development of the online tool;
- Accreditation letter on behalf of EIGE, to contact and inform stakeholders about the aim of the study and about the tasks;
- Contact person as project manager as well as for specific activities (Communication, WEB);
- Calendar of EIGE's events.

1.5 INTERMEDIATE OUTPUTS AND DELIVERABLES

The payment will be linked to the approval of:

1. Deliverable 3 (week 17)
2. Interim report, Deliverable 8 (week 24)
3. Final report, Deliverable 14 (week 60)

Payment should reflect the following pace of implementation:

- 1st payment – 20%
- 2nd payment – 50%
- Final payment – 30%

1.6 FINAL OUTPUT AND DELIVERABLE

D1 Inception report	Electronic version	W2
D2 Report of the Experts' Group meeting	Electronic version	W7
D3 Analysis of main initiatives related to the integration of GM into research institutions	Electronic version	W17
D4 Report of the online discussion	Electronic version	W21
D5 Set of good practices	Electronic version	W22
D6 Opinion paper: the benefit of gender equality in research	Electronic version	W24
D7 Report of the Peer Review	Electronic version	W24
D8 Interim Report plus annexes	Electronic version – paper version	W24
D9 Online tool	IT product	W44
D10 Learning Seminar materials and Report	Electronic version	W48
D11 Factsheets	Electronic version	W50
D12 Communication strategy	Electronic version	W52
D13 Executive Summary	Electronic version	W60
D14 Final Report	Electronic version	W60

Deliverables will have to comply with EIGE's style guide¹⁴ and they must be submitted in English.

Reports and content of deliverables must be in copyedited¹⁵ and proofread¹⁶ English and in clear and understandable style. The text should be easily-readable providing information and analyses that can be

¹⁴ <http://www.eige.europa.eu/content/document/eige-style-guide>

¹⁵ 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 the Institute's staff and external researchers, with varying linguistic backgrounds.
- (Re)writing/editing short articles for web pages and/or handouts or slides on the basis of longer reports.
- Resolving queries with the authors and the Institute'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.

¹⁶ 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 and grammar as well as all relevant terminology;
- Ensuring that no typographical errors are left in final texts.

understood by non-academics. The style should be balanced and must not contain unsubstantiated statements.

The written documents must be delivered in MS Word format, the format of the annexes may vary depending on the type of information to be shown. All the reports with corresponding Annexes should be provided in hard copy and in an electronic copy.

The documents must be delivered in an appropriate layout and may contain the visual elements (e.g. tables, boxes, graphs) to enhance the readability of the documents. The visual elements shall be well-developed and accurate. The data necessary for reproducing graphs contained in the reports must be delivered in MS-Excel electronic files with one graph/table per spread sheet, and each spread sheet must be numbered using the same system as the one used in the report file.

EIGE will have the exclusive rights to publish the results of the project. The contractor must ensure that there are no restrictions on access, confidentiality and/or intellectual property rights expected from the third party.

When necessary, activities aimed at producing deliverables, must run simultaneously to ensure their effective delivery within the given timeframe.

The contractor must respect deadlines specified in the contract. All the deliverables must be revised by the contractor according to EIGE's recommendations, as necessary, and returned within the deadlines mentioned in the contract.

EIGE will provide feedback on the content of the deliverables and suggest any changes and amendments within the time specified in the contract. The content of final reports will be revised, if needed, by EIGE. All materials and reporting from the project, is owned by EIGE and cannot be used by the contractor until they are made public and with the expressed written consent of EIGE.

The procedure for accepting the deliverables shall be as follows (if not foreseen differently for specific deliverables). EIGE receives the deliverables according to the contract deadlines. The deliverable is evaluated based on the requirements of the Terms of Reference. Further actions, which in the opinion of EIGE, would be necessary for the acceptance of the deliverables will be implemented by the contractor without delay. A new deliverable which takes into account comments and suggestions made by EIGE will have to be re-submitted within the agreed deadline, but not later than within ten (10) calendar days. The deliverable is considered as a final deliverable only after its acceptance by EIGE.

1.7 GENERAL GUIDANCE ON METHODOLOGY

Tenderers will propose a methodological approach to produce the best results in a timely and cost-effective manner taking, into account the thematic and geographical scope of the study. The tenderers must take into account the work (both literature review and fieldwork research) in different linguistic environments and a possible need for translations from all official EU languages.

In the technical proposal the tenderer will especially elaborate on the proposed methodological approach.

-
- 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.

Integrating Gender Equality into Research Performing Organisations RPO and university.
Research, Practices and setting of on-line Tool on Gender Equality Plans

The technical offer should specify the methodological approach adopted for the implementation of the whole project as well as **for each single deliverable**.

Tenderer will have to provide a clear context overview on the issue of gender equality and research, to demonstrate a sound knowledge of the context as well as of the main trends, gaps and challenges.

The tenderers will have to indicate clearly:

- How the requested information on existing policies and ongoing projects, networks and programmes, at a European level as well at Member States level, will be collected, systematized and analysed;
- What sources will be taken into consideration;
- Which stakeholders will be involved;
- How relevant stakeholders will be involved;
- How the specific criteria for the collection of examples will be developed;
- What kind of internal and external assessment process will be adopted to ensure accountability, relevance and coherence of the collected examples;
- How the evidence provided by the effectiveness of the examples will be used to develop the opinion paper on the benefit of gender equality in research;
- What benchmark analysis will be implemented to design the online tool to integrate gender equality in RPOs and universities;
- How the analysis and understanding of the needs, requirements and priorities of the online tool target audiences and EIGE, regarding the online tool, will happen;
- How the content for the online tool will be developed according to its user's needs;
- How the online tool will be developed, in a way that will allow an iterative development process (a process that will allow multiple feedback cycles) and will meet the requirements specified for deliverable 9 – Online tool.

The methodology and the content of the materials for the online tool will have to follow the three phases of the integration of gender equality into RPOs and universities, by following the Planning, Implementation and Evaluation approach of institutional change.

It will have to address the competence development of the policy makers, HR staff, and researchers and academics with management responsibilities in RPOs and universities.

Tenderers will have to present clearly how they suggest displaying information into different steps to explain how to set up, implement, monitor and assess a Gender Equality Plan within RPOs and universities.

The tenderers have to present as well the methodological approach to project management, with specific concern on risk assessment related to the implementation of a complex project.

Project management is expected to show how the tenderers will deal with parallel activities, coordination of different tasks and expertise and the timing of the project.

Specific concern must be devoted to quality assurance, with specific reference to the quality, relevance, coherence, accountability and level of update of the expected results. At the same time, specific concern must be addressed and clearly presented for the quality, readability and style of the language used for the deliverables. A specific expertise and adequate resources are expected to be devoted to this issue that is extremely relevant for EIGE.

Tenderers are requested to assess and show evidence of knowledge of existing effective approaches and relevant tools, funded by EU and related to RPOs and universities.

A clear demonstration of the coherence and the relevance of the proposed methodological approach with the EU policy framework on gender equality and research must be provided.

The technical offer should present the following sections:

- a) Demonstration of a clear understanding of the objectives and assignments
- b) Methodological approach
- c) Project management, organisation of the project team, internal communication
 - a. Risk assessment
 - b. Internal coordination of parallel tasks and different expertise
 - c. Description of the activities
 - d. Parallel tasks, milestones and deadlines
- d) Quality assurance
 - a. Quality of deliverables
 - b. Quality of language
- e) Methodology for implementing the online tool

During the Inception meeting the Contractor will also be provided with information collected by EIGE during the previous studies that is relevant for the purposes of this project.

1.8 PERFORMANCE AND QUALITY REQUIREMENTS

All deliverables must comply with the requirements set in the technical specifications. In particular, they will have to comply:

1. Timing of delivery
2. Quality, consistency, coherence and relevance of the content;
3. Quality of language, editing and proofreading;
4. Usability of the online tool;
5. Inclusion of the assessment provided by stakeholders, after the final presentation of the online tool;
6. Timely introduction of all recommendations and improvement requirements provide by EIGE, as assessment of each deliverables.

1.9 GENERAL DELIVERY TIME AND PROGRESS MEETINGS

The timing of the delivery is presented in the list of deliverables

The Contractor will be requested to attend the following meetings:

- a) Inception meeting, Vilnius. W2
 - a. Project manager, senior researcher (s), IT expert will be requested to attend.
 - b. A brief presentation of technical offer and context analysis for EIGE's research team will have to be delivered
- b) Interim meeting, Vilnius W26
 - a. Project manager, senior researcher will be requested to attend.
- c) Consultation meeting (Vilnius), Peer Review (Vilnius) W23 and Learning seminar (Brussels) W48

Integrating Gender Equality into Research Performing Organisations RPO and university.
Research, Practices and setting of on-line Tool on Gender Equality Plans

- a. Project manager, senior researcher will be requested to attend.
- b. Key note speakers for Peer Review and for Learning Seminar will have to be suggested to EIGE

1.10 INTELLECTUAL PROPERTY RIGHTS

In accordance with Article II.10.2 of the Draft contract, whereby EIGE acquires ownership of the results as defined in the tender specifications (Annex I), these results may be used for any of the purposes listed in Draft contract Art. I.8.

1.11 OPTIONAL CLAUSES

EIGE retains the right to publish any outcomes of the contract first.

When the contractor is using the data he/she shall use the reference to this contract as well as a disclaimer stating that: "the presented information and views do not reflect the official position of the European Union".

The contractor shall inform EIGE of possible making use of the data and other outcomes of this contract.

2 THE TENDER

2.1 SUBMISSION OF THE TENDER

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

Being launched by an EU Agency, this procurement procedure is not opened to the countries parties to the multilateral agreement on government procurement - 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 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 EIGE (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

25/05/2015 at 14:30 EET (Vilnius time)

at the following location:

European Institute for Gender Equality
Gedimino pr. 16
01103 Vilnius, Lithuania

One authorised representative of each tenderer may attend the opening of the bids as observer. Companies wishing to attend are requested to notify their intention at the latest 2 working days in advance to the

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Research, Practices and setting of on-line Tool on Gender Equality Plans

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 (*for private entities*: proof of registration, VAT registration etc; *for individuals*: copy of passport, proof of registration/VAT if applicable; *for public entities*: official document on establishment etc).

Joint Offers

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

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

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

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

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

In case of submission of a joint offer, the Tenderers are asked to provide an original 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.

Where they have doubts as to whether tenderers are in one of the situations of exclusion, EIGE may itself apply to the abovementioned competent authorities to obtain any information they consider necessary about that situation.

EIGE may waive the obligation of a tenderer to submit the abovementioned documentary evidence if such evidence has already been submitted to it for the purposes of another procurement procedure and provided that the issuing date of the documents does not exceed one year and that they are still valid. In such a case, the tenderer shall declare on 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.

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 subcontracting to the same subcontractor not more than 30% of the contract, provided the main contractor does not rely on the subcontractor's economic and financial capacities, the subcontractor(s) does not have to provide the economic and financial capacity form. However, EIGE reserves the right to request additional information for the evaluation of the economic and financial capacity.

EIGE may waive the obligation of a tenderer to submit the abovementioned documentary evidence if such evidence has already been submitted to it for the purposes of another procurement procedure and comply with 2.4.3.A and 2.4.3.B. In such a case, the tenderer shall declare on 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. A. Economic and financial capacity

Tenderers must provide EIGE with sufficient proof of their financial standing, and more importantly that they have the necessary resources and financial means to carry out the work involved. The tenderer must prove they are viable for the duration of the contract.

Evidence 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 than 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:

- Develop a guidance tool, supported by scientific and research knowledge as well as technical skills;
- Gather and manage different skills and competences;
- Manage and implement complex project and parallel activities;
- Identify and mobilize relevant stakeholders;
- Develop content to be embedded in an online guidance tool;
- Access and analyse most relevant data, sources and resources related to the topic of the study;
- Implement EU projects.

The contractor shall also recruit necessary support staff for the management and implementation of the project. All costs for employing any additional experts during the implementation phase of the project are to be borne in full by the contractor.

General professional requirements for the team

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 equality and research;
- ability to assess the quality, reliability, comparability of data;
- proven skills in collection and objective interpretation and analysis of data and information;
- strong analytical and writing skills, experience in drafting analytical reports in a European context;
- experience in organising consultation processes (seminars, round tables);
- very good command of English.

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, expressing the required quality.

The required experience of the team members should be explicitly reflected in their CVs. 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.

1 Project Manager

Qualifications and professional experience

- University degree;
- A minimum of five (5) years of professional experience in project management;
- Proven experience in research management, as manager or coordinator of a least three (3) 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).

3 Senior Researchers

Qualifications and professional experience

- University degree in social sciences;
- Proven experience in international or European research projects (at least two projects are required);
- A minimum of five (5) years of research experience in gender equality issues (preferably with links to gender equality and research);
- Excellent knowledge of English (Level C1 based on Europass CV model).

Senior researchers will have to sign and certify all the expected deliverables, providing the quality assurance related to quality, consistency and relevance related to the aim and the content of the study.

Pool of National Research Experts

In addition to the profiles listed above, a successful project team will be composed of:

- an adequate number of national researchers (with adequate language skills), supporting the senior researchers' analysis, able to map required information in all EU Member States.

Qualifications and professional experience

- University degree social sciences;
- Proven experience in research in gender issues supported by relevant publications, references to past projects of professional profile;

Senior IT analyst

Envisaged tasks (non-exhaustive list):

- design and implement research methodologies to help gain understanding of user needs requirements, priorities and behaviours;
- analyse, understand and document business, user, functional, quality-of-service and technical requirements and transform them into concrete specifications;
- design the navigation scheme and Information Architecture;
- design processes and functions that help users interact with the online tool and achieve their goals;
- collect, measure, analyse and report data to understand and optimize the usage of and performance of the online tool;
- produce use case models and software architecture documentation;
- analyse and present advantages and disadvantages of proposed solutions;
- participate in meetings with EIGE and EIGE's stakeholders.

Qualifications and professional experience must include:

- university degree;
- minimum of six years of professional experience in information systems analysis;
- proven experience as an analyst of at least five information systems;
- excellent knowledge of English (Level C1 based on Europass CV model).

Senior web developer

Envisaged tasks (non-exhaustive list):

- analyse and design a software architecture that will satisfy the defined requirements of the online tool;
- develop the online tool according to the defined requirements both front-end and back-end;
- produce the technical documentation of the application (e.g. system design, source code documentation)
- produce prototypes of the application
- identify, install, modify, and customize any third party software to be used

Qualifications and professional experience must include:

- minimum of six years of professional experience in web development in Drupal;

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Research, Practices and setting of on-line Tool on Gender Equality Plans

- proven experience in web development in Drupal7 of a least five projects

Graphical interface designer

Envisaged tasks (non-exhaustive list):

- design and produce wireframes and prototypes;
- create the graphical user interface of the online tool;
- design the visual elements of the online tool user interface including typography, images, and colours;

Qualifications and professional experience must include:

- university degree;
- minimum of four years of professional experience in web designing;
proven experience in online graphical interface designing, as a designer of at least five projects;

Professional Editor

Qualifications and professional experience

- Proven experience in English language proofreading and copyediting, editorial skills and ability to edit reports and documents in a clear and professional style;
- A minimum of five similar experience in similar projects or activities;
- Excellent knowledge of English (Level C1 based on Europass CV model).

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:

- List of implemented services and projects, demonstrating capacity listed at 2.4.3. B.
- Samples of up to three EU and/or international projects
- 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 tenderer shall include into the offer the CVs for the profiles specified for the General professional requirements for the team.

- .
- List of national researcher profiles (no CVs required at this stage)

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 their Technical Offer following the structure described below:

1. Demonstrate a clear understanding of the objectives and assignments under this contract
2. Present proposed approaches and methodologies
3. Offer project management which would correspond to the specificity and needs of this project
4. Offer a project team structure and organisation which would ensure competent and timely provision of services and deliverables requested under this contract, guaranteeing a high level of quality
5. Suggest a detailed work plan and timeline
6. Present an effective system of quality assurance for results and deliverables. The strategy and the measures adopted to guarantee quality and consistency of the deliverables, for all that relates to language, editing, proofreading and copy editing.

In particular, for the research tasks, the Technical offer has to describe clearly:

- The knowledge about the issues related to the objectives of the research, at an EU and national level;
- The methodological approach developed to achieve the expected results;
- The strategy to deliver expected results, aiming to provide relevant, coherent, accountable information and develop qualitative analysis and recommendations, consistent with EIGE's mission to support and promote gender equality in EU and Member States;
- The operational structures provided to implement the activities and to fulfil the foreseen tasks, with particular concern on project management, risk assessment, coordination of expertise required and the strategy to manage different activities in the given timeline;

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 330.000,00, excluding VAT. Tenders presenting a total price superior to this maximum amount will be excluded.

The tenderer 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.

All costs of the project must be quoted in the Financial Offer Form

The tenderer must specify the category of experts to be involved in the project and:

- The total number of days (person-days) each member of staff will contribute to the project, broken down by service/deliverable;
- Professional fees should be expressed as the number of person-days multiplied by the unit price per working day for each expert category proposed. The unit price should include expert's fees and all associated costs, e.g. administrative expenditures, travel, working place costs, consumables etc.;
- Other costs shall include direct costs such, translation expenses, costs relative to the deliverables etc.
- For the organisation of the meetings under this contract the tenderer shall put a fixed maximum amount of € 90.000,00. This amount does not cover the contractor's own expenses on the preparation, organisation of and participation in the meetings. These contractor's costs shall be included into the contractor's fees.

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

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

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

3 THE ASSESSMENT PROCEDURE

3.1 EVALUATION OF THE TENDERERS

Stage 1 - Application of exclusion criteria

The (non-)exclusion of the tenderer will be evaluated on the basis of the documents submitted as indicated in Section 2.4.2 Exclusion criteria.

Contract may not be awarded to tenderers (legal or natural persons) who:

- are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information;
- are subject to a conflict of interest in connection with this contract;
- are in one of the situations leading to exclusion, as indicated in Section 2.4.2 Exclusion criteria.

In case of joint offers or/and subcontracting, the exclusion criteria will be assessed in relation to each consortium member and subcontractor individually.

If a member of a consortium is subject to exclusion, the rest of the consortium will be excluded.

If a subcontractor is subject to exclusion, the tenderer shall be excluded.

Stage 2 - Application of selection criteria

The aim is to check the technical and professional capacity and economic and financial capacity of each tenderer who has passed the exclusion stage.

The admissibility of the tenderer will be evaluated on the basis of the documents submitted as indicated in Section 2.4.3 Selection criteria. All tenderers will undergo strict evaluation of conformity to selection criteria laid down in the Tender Specifications. The Tenderers not satisfying the selection criteria will not be selected and their offers will not be further evaluated against award criteria.

In case of joint offers or/and subcontracting:

- For minimum viability standards on financial and economic standing an individual evaluation shall take place
- For the overall turnover or turnover a consolidated assessment shall be made.
- The selection criteria for technical and professional capacity will be assessed in relation to the combined capacities of all members of the consortium and subcontractors, as a whole.

3.2 EVALUATION OF THE TENDERS

Stage 3 - Application of award criteria

The aim is to assess, on the basis of the award criteria, the technical and financial offers and establish a ranking list in order of merit.

A. Technical evaluation

The quality of Technical Offers will be evaluated according to the following technical award criteria:

Criteria number	Criteria description	Maximum points per criteria	Minimum required score
1	Methodological approach	60	36
	<ul style="list-style-type: none"> Demonstration of a clear understanding of the objectives and assignments under this contract Soundness and appropriateness of the methodological approach for the implementation of tasks and the deliverables: 	10	6
	Methodology for Analysis	15	9
	Methodology for identification/involvement of Stakeholders	10	6
	Methodology for collection of good practices	10	6
	Methodology for implementing the online tool	15	9
	Methodology of organization of project meetings	5	3
2	Project management, organisation of the project team,	25	15
	<ul style="list-style-type: none"> project team matrix (composition, organisation) project management flows and organisation Work plan and timeline 	10	6
		10	6
		5	3
3	Quality assurance	15	9
	<ul style="list-style-type: none"> quality or results quality of deliverables quality of presentation and language 		
Total		100	60

When preparing the technical offer the tenderer has to bear in mind that:

1.

In regard to **Demonstration of a clear understanding of the objectives and assignments**, the evaluation committee will assess to what extent the tenderer has understood assignment and the context in which it will be carried out.

The evaluation committee 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.

This aspect also relates to the logic, structure, completeness of the tenderer's offer in its entirety with regard to the activities to be implemented and the deliverables to be produced under this contract.

Tenderers must describe in detail their proposed **Methodological approach** to provide the contracted services and deliverables. Tenderers should clearly explain the reasons for their specific methodological choice and the usefulness of the proposed methodological solution for an effective implementation of tasks as defined by the technical specifications.

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 on integrating gender equality into research institutions. They are expected as well to explain how they will develop the analysis of the EU scenario on gender and research, with specific reference to the objectives of the project.

Tenderers shall explain clearly and convincingly how they are going to identify and involve relevant stakeholders.

Tenderers are expected to present methodology and design of the meetings demonstrating how the proposed solutions meet the needs of this project. Tenderers should explain in detail how they will ensure that the same methodological guidelines are applied across the different countries and how the national researchers engaged in the fieldwork will be briefed to ensure the application of the same approach.

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.

For the Methodology for implementing the online tool.

Tenderers are expected to explain how the online tool will be designed and implemented, both for the content development and the IT infrastructure.

Tenderers should clearly present the methodology covering all aspects of the implementation of the online tool (analysis of users' needs, requirements and priorities, content development, online tool development).

2. Project management, organisation of the project team and communication. Work plan and timeline

The tenderer should provide a clear proposal presenting the project management (with specific concern to risk management related to deadlines and activities to conduct in EU Members States, monitoring and evaluation, timing), outlining the organisation and composition of the project team, making clear how the professional qualifications, skills and competences that the team possesses and gathers will be organised and used for the effective and timely implementation of this project.

The tenderer must specify respective roles of the team members and their contributions to specific activities and deliverables under this project. The tenderer's technical proposal should indicate clearly the amount of time each team member will devote to the project and explain how the stability of the team will be ensured.

The tenderer must demonstrate the capacity to set up the appropriate organizational structure to carry out all the tasks under this contract as well as demonstrating a proven capacity to manage the administrative and financial aspects of such a contract.

The tenderer has to demonstrate how the proposed composition of the team will ensure coverage of EU Member States, including the ability to rely on local researchers to conduct fieldwork. The tenderers are to provide a list of local researchers ready to undertake the local assignments for this study.

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 have to present as well a clear communication strategy, both internal among partners and external towards EIGE, identifying for each key role a responsible person.

The tenderer shall also explain how the quality of work will be monitored and how the quality assurance will be managed.

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.

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 have to 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 has to be clearly connected to the project management and emphasize risk assessment related to the delivery of the expected results.

Quality assurance

Tenderers should present the approach adopted for quality assurance, with specific attention to the quality, relevance and coherence of the deliverables.

The tenderers are requested to present the strategy, tools and resources the tenderer is going to use for quality assurance.

Particular concern is requested for professional quality of English language and the tenderers must present the strategy and the resources related to this issue.

Tenders scored both below the minimum score required per criterion and below 60 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:

$$\text{Final score for Tender} = \text{Technical score} \times 100.000 / \text{Price}$$

The tenderer having the highest score will be awarded the contract under condition of respect of requirements on absence of conflict of interest and other requirements linked to criteria on exclusion from award.

EIGE will inform tenderers of the decisions reached concerning the award of the contract, including the grounds for any decision not to award a contract or to recommence the procedure.

3.3.2 Information to tenderers

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

The information letters will be sent electronically to the e-mail address indicated in the form "Identification of the tenderer". **The tenderer is asked to confirm in writing, by e-mail to procurement@eige.europa.eu the receipt of the information letter.**

If the framework contract is awarded, the unsuccessful tenderers who have been selected and whose tender has not been eliminated may request in writing information about the characteristics and relative merits of the winning tender and the name of the successful tenderer. EIGE will provide this additional information within fifteen calendar days of receiving the written request.

The tenderer is asked to notify in writing, by e-mail to procurement@eige.europa.eu the receipt of the additional information letter.

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 electronic dispatch of the notification on the award decision and letters to unsuccessful tenderers.

If both the electronic communication and fax fail, the notification will be re-sent immediately by letter, in which case the standstill period of 14 calendar days will apply.

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

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 2015. The duration of the tasks shall not exceed 15 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 330.000,00 EUR, excluding VAT. Any bid exceeding this amount will not be considered.

4.5 TERMS OF PAYMENT

Payments shall be made in accordance with Articles I.4 of the Draft Service Contract.

Payments shall be executed only if the Contractor has fulfilled all the contractual obligations by the date on which the invoice is submitted. Payment requests may not be made if an earlier payment has not been executed as a result of default or negligence on the part of the Contractor.

4.6 GUARANTEES

No guarantees are required by the contract.

4.7 DATA PROTECTION

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