



EIGE/2015/OPER/20

TENDER SPECIFICATIONS

Study on the Economic Benefits of Gender Equality in the European Union

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.

TABLE OF CONTENTS

1	TECHNICAL SPECIFICATIONS	3
1.1	CONTRACTING AUTHORITY	3
1.2	BACKGROUND INFORMATION	4
1.3	SCOPE OF THE STUDY	8
1.4	GENERAL OBJECTIVE	10
1.5	SPECIFIC OBJECTIVES AND TASKS	10
1.6	METHODOLOGY	20
1.7	DELIVERABLES	21
1.8	PROVISIONAL TIMELINE	28
1.9	RESPONSIBILITY	28
1.10	PROJECT TEAM	28
1.11	COMMUNICATION	30
1.12	MONITORING OF PROJECT IMPLEMENTATION AND QUALITY CONTROL	30
2	THE TENDER	31
2.1	SUBMISSION OF THE TENDER	31
2.2	CONTENT OF THE TENDER	32
2.2.1	SECTION ONE: ADMINISTRATIVE INFORMATION	32
2.2.2	SECTION TWO: EXCLUSION CRITERIA DOCUMENTATION	34
2.2.3	SECTION THREE: SELECTION CRITERIA DOCUMENTATION	36
2.2.4	SECTION FOUR: TECHNICAL OFFER	40
2.2.5	SECTION FIVE: FINANCIAL OFFER	41
3	THE ASSESSMENT PROCEDURE	42
3.1	EVALUATION OF THE TENDERERS	42
3.2	EVALUATION OF THE TENDERS	42
3.3	AWARD OF THE CONTRACT	46
3.3.1	AWARD PRINCIPLE	46
3.3.2	INFORMATION TO TENDERERS	46
3.3.3	STANDSTILL PERIOD	46
3.3.4	EVIDENCE BY CONTRACTOR	47
3.3.5	NO OBLIGATION TO AWARD THE CONTRACT	47
4	THE CONTRACT	47
4.1	PLACE OF PERFORMANCE	47
4.2	VOLUME OF THE CONTRACT	47
4.3	TERMS OF PAYMENT	47
4.4	GUARANTEES	48
4.5	DATA PROTECTION	48

1 TECHNICAL SPECIFICATIONS

1.1 CONTRACTING AUTHORITY

Equality between women and men is a fundamental value of the European Union, enshrined in its Treaties¹ and in the Charter of Fundamental Rights of the European Union. **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 1996¹ as: *"(...) mobilising all general 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)"*.

A better understanding of the contribution of gender equality to individual wellbeing, family life, social cohesion, and business innovation as well as its impact on sustainable economic growth and productivity can promote gender equality and provide the basis for policies that aim to close the gender gaps at all levels.

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

In order to meet these objectives, EIGE shall collect, analyse and disseminate relevant objective, comparable and reliable EU-wide information and data on equality between women and men. In addition, EIGE shall develop methods to improve the objectivity, comparability and reliability of data at European Union level by establishing criteria that will improve the consistency of information and take into account gender issues when collecting data.⁴

EIGE's activities are guided by its strategic medium-term priorities for 2013-15 and annual work programmes. EIGE has committed itself to a more systematic analysis and presentation of the social and economic benefits that can be derived from gender equality.

One of EIGE's strategic priorities is to develop an analytical tool that identifies the benefits of gender equality.

¹ Articles 2 and 3(3) TEU and Article 8 TFEU.

² Established by the European Parliament and of the Council Regulation (EC) No 1922/2006 of 20 December 2006 (OJ L 403/9 of 30.12.2006)

³ Article 2, Idem 2

⁴ Article 3, Idem 2

The study commissioned through this Invitation to tender is undertaken within the scope of EIGE's Work Programme 2015. EIGE will offer a ten-month service contract to the selected service provider/consortium to carry out a research project on the Economic Benefits of Gender Equality in the European Union. The research project envisaged in the course of the service contract will contribute to 2015 EIGE's Work Plan section on the Benefits of Gender Equality.

1.2 BACKGROUND INFORMATION

INTRODUCTION

The European Union is based upon the fundamental importance of human rights and values, including the right to equality between women and men⁵. Gender equality is a valued goal in itself, an essential aspect of human dignity and social justice. It is also a key factor in self-reported well-being and happiness across the world. In addition, increasing gender equality is an effective means to the achievement of other political and socio-economic goals. Demonstrating the social and economic returns to achieving greater gender equality can contribute to sustain public and private interest in gender equality policies.

To fulfil its mandate, EIGE aims at collecting evidence of the political, social and economic gains inherent in gender equality policies.

EIGE'S WORK ON THE BENEFITS OF GENDER EQUALITY

All public sector organizations need to demonstrate their effectiveness and significant return-on-investment of public funds. This is often expressed in terms of impact on the economy and society but extends to specific investments in a variety of sectors. EIGE's program on the Benefits of Gender Equality is designed to enhance the ability to demonstrate benefits, value and impact of gender equality.

The program has started⁶ by identifying dimensions and perspectives to assess and collect evidence on the benefits of gender equality in the EU. Research tells that greater gender equality and a more efficient use of skills are essential to achieving strong and sustainable growth⁷. However, while an emerging body of research on the benefits of income equality at large has emerged as a consequence of the financial and economic crisis, little attention has been paid to the specific benefits of gender equality.

⁵ <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2010:083:0013:0046:en:PDF>

⁶ EIGE has benefited from the input and suggestions provided by participants in an online discussion and two expert group meetings organized in 2013. Furthermore, four background papers were commissioned and extensively peer-reviewed during a consultation meeting in Vilnius in 2014.

⁷ OECD (2012), *Closing the Gender Gap: Act Now*, OECD Publishing. <http://dx.doi.org/10.1787/9789264179370-en>

The reality of gender equality varies widely in EU Member States. The 2013 EIGE's Gender Equality Index⁸ values span from 33.5 (Romania) to 74.3 (Sweden). Despite these differences, research indicates that gender equality has the potential to generate significant benefits at economic, political and social level in all countries. The extent to which these benefits can be realised depends heavily on country-specific factors.

EIGE's work on the Benefits of Gender Equality is three-fold (1) by assessing evidence from the available research literature on benefits of gender equality; (2) by producing evidence to break new ground on the economic benefits of gender equality; (3) by making the evidence on the economic benefits of gender equality accessible to policy-makers.

Expected results aim to strengthen the evidence base which can support policy- and decision-makers in the European Union at different levels in designing and implementing policies and measures for the prevention and/or reduction of gender inequalities.

Research has identified different dimensions and approaches to describe and analyse the benefits of gender equality. Accordingly, the benefits of gender equality can refer to the elimination of inequalities in political power, in the labour market, in time-use, in education, etc. In addition, benefits can be classified as economic, social, political, cultural... The benefits of gender equality can affect individuals, families, groups, organizations, business and societies at large. Finally, benefits can take place in a near-termed or long-termed timeframe.

Therefore, the effect of improved gender equality in different dimensions and sectors can be considered with regards to different outcomes that are relevant to assess the social and economic benefits. This point of departure leads to questions related to whether some benefits produce higher return on investment and/or to available methodologies to adequately assess them.

ECONOMIC AND SOCIAL BENEFITS OF GENDER EQUALITY

Efforts to improve productivity and earnings and increase the number of women in the workforce are important for women and for the economy. Jobs empower women and yield positive spillovers for the society. The increase of additional earners in the economy can significantly increase gross domestic product⁹. These benefits provide a convincing argument for investing in gender equality and expanding women's economic participation, empowerment, and independence.

Evidence summarised by the research literature demonstrates that women who benefit from greater economic assets and opportunities can increase their incomes and

⁸ <http://eige.europa.eu/content/gender-equality-index>

⁹ Chabaan, J. & Cunningham, W., (2011) *Measuring the Economic Gain of Investing in Girls: The Girl Effect Dividend*. Policy Research Working Paper 5753. World Bank; Cubers, D. & M. Teignier-Baque (2011), *Gender Inequality and Economic Growth*, Background Paper. World Development Report 2012.

productivity, are often less vulnerable to domestic violence¹⁰, are less likely to fall into chronic poverty¹¹ after a crisis such as the death of a husband or divorce, and more likely to increase their bargaining power and voice in the household¹². In turn, higher women's earnings and decision-making power translate into greater investment in children's health and education¹³.

In addition to gains for individual women and the economy, income-enhancing intervention for women can help to change traditional gender norms that influence family spending and roles¹⁴. Raising aspirations for girls, along with increased attention and spending on them, may be among the most consequential benefits of economic independence of women.

ECONOMIC CASE FOR GENDER EQUALITY

The economic case for gender equality emphasizes economic benefits of gender equality at a macro level. An economic case stresses the wider economic benefits that span individuals, firms, regions and nations¹⁵. It recognises the costs of non-equality and starts viewing gender equality as an investment: a productive factor that can be leveraged exploiting the full productive potential of the labour force, a precondition for sustainable demographic development, and an increase in net contributions to fiscal systems providing financial gains to states.

In 2007, the World Bank Group launched a four-year action plan to improve women's economic opportunity- Gender Equality as Smart Economics invested in the improvement of women's access to jobs, land rights, financial services, agricultural inputs and infrastructure. The Swedish Presidency of the Council of the EU in 2009 organized the conference "What does gender equality mean for economic growth and employment?" and presented the so-called economic case for gender equality with the aim to deepen and reinforce the arguments for strengthening the gender equality dimension in the EU 2020 Strategy.

¹⁰ Proynk, P., Hargreaves, J., Kim, J., Morison, L., Phetla, G., Watts, C., Busza, J. & Porter, J. (2006) Effect of a structural Intervention for the prevention of intimate-partner violence and HIV in rural South Africa: a cluster randomised trial. *Lancet*, 368, 1973-1983

¹¹ Morrison, A., Raju, D. & Sinha, N. (2007), *Gender Equality, Poverty and Economic Growth*, Policy Research Working Paper 4349, The World Bank, Gender and Development Group, Poverty Reduction and Economic Management Network.

¹² Branisa, Boris, Stephan Klasen, and Maria Ziegler (2013) "Gender Inequality in Social Institutions and Gendered Development Outcomes." *World Development*, 45: 252-268.

¹³ Baliaoune-Lutz, M., and McGillivray, M. (2009) "Does Gender Inequality Reduce Growth In Sub-Saharan African And Arab Countries?" *African Development Review*, 21(2): 224-242; Duflo, Esther (2003) "Grandmothers and Granddaughters: Old-Age Pensions and Intrahousehold Allocation in South Africa." *World Bank Economic Review*, 17 (1): 1–25; Elborgh-Woytek, Katrin, Monique Newiak, Kalpana, Kochhar, Stefania Fabrizio, Kangni Kpodar, Philippe, Wingender, Benedict Clements, and Gerd Schwartz (2013) 'Women, Work, and the Economy: Macroeconomic Gains From Gender Equity', IMF, Staff Discussion Notes SDN/13/10, September 2013.

¹⁴ Seguino, Stephanie and Maria Sagrario Floro (2003) "Does Gender have any Effect on Aggregate Saving? An empirical analysis." *International Review of Applied Economics*, 17(2):147-166; Hiller, Victor (2014) "Gender Inequality, Endogenous Cultural Norms, and Economic Development." *Scandinavian Journal of Economics* 116 (2): 455-481.

¹⁵ Bettio, Francesca & Smith, Mark (2008) 'The Economic Case for Gender Equality', Analysis Note: European Commission, Directorate-General for Employment, Social Affairs and Equal Opportunities.

The study on Economic Benefits of Gender Equality is expected to map and consolidate policy-relevant research findings on the effect of different systemic factors¹⁶ closely related to equality of women and men in major dimensions of the economy and social development¹⁷ to further analyse the most relevant methodological models to assess the economic benefits of gender equality.

RATIONALE FOR THE STUDY

The economic independence of women is a core priority for the EU. Economically strengthening women is a matter of advancing women's human rights as well as reducing poverty. Moreover, limited economic independence keeps the EU far from reaching its economic potential, keeps women and children increasingly in poverty and reduces choice. Women's economic independence and employment is increasingly viewed as a critical factor to achieving sustainable economic growth.

There has been progress in the participation of women on the labour market during the last decade, with the female employment rate rising to 62.5%. In the EU, women accounted for 9.8 million out of 12.5 million additional employment between 2000 and 2009. This increased participation has contributed to economic growth in the EU. However, despite a general trend towards more equality in society and on the labour market, progress in eliminating gender inequalities remains slow. Furthermore, macro-economic reforms in the past years have had a particularly adverse impact on women, cutting back on public services that had supported their reproductive roles while requiring them to increase their productive efforts.

Women's employment rates in the EU have markedly increased since the mid-90s and range from some 40% to 75% across the EU. The EU average in 2009 was 75.8% for men and 62.5% for women. In 2013, the employment rate for men stood at 69.4 % in the EU-28, as compared with 58.8 % for women, far from Europe 2020 targets of a 75% employment rate for women and men.

Despite the progress in the proportion of women in employment, gender gaps persist. Women work less than men and fewer women are entrepreneurs. Women earn less than men (wage gap and pensions inequalities). A gender-segregated labour market, the difficulty of balancing work and family life, the undervaluation of female skills and work are some of the complex causes of the persistent gender pay gap.

Employment rates are low for mothers of young children. Only 65.6% of women with children under 12 works, as opposed to 90.3% of men, reflecting the disparate impact of parenthood on labour market due to the unequal sharing of family responsibilities and a lack of childcare and work-life balance opportunities. In addition, women work part-time more than men (accounting for over 75% of part-timers), in less valued jobs and

¹⁶ Provision of childcare facilities, legal system of fully-paid parental leave arrangements, availability of support services for dependent and elderly persons, existence of care infrastructure in general, etc.

¹⁷ Economic growth, employment rates, fertility rates, etc.

sectors. [Women in the EU earn on average 16% less than men for each hour worked](#). The proportion of single mothers in paid employment is higher than that of partnered mothers but they face higher poverty risk.

The persistent unequal distribution of unpaid work on women in the access to employment limits women's choices and this is shown by the still much higher probability that women are over represented in part-time and micro-jobs (with less than 10 hours a week)¹⁸ with negative consequences on women's access to economics resources, both in terms of current earnings and access to social security, leading to lower retirement pensions and higher chances to be exposed to the risk of poverty and social exclusion.

Understanding the circumstances under which women's economic empowerment enhances growth has been researched exhaustively in the EU¹⁹. Some existing literature addresses issues related to employment of women, economic growth and factors influencing women's access to employment. However, many evidence gaps remain, particularly regarding the aggregated effects of significant variables that have been examined independently in former studies²⁰. While there is fractured research on this issue in EU institutions and some but not all Member States, the contributions of gender equality for sustainable economic growth and wellbeing of society at large has not been estimated in a comprehensive manner.

In addition, while there is evidence about the links between gender equality and economic growth, the relationship is complex and not uniform. A wide literature and research on gender equality and economic growth addressed the links leading from gender equality in different dimensions to economic growth. There is a need to systematise the research results and methodologies used in order to further investigate the ways in which these relationships play out in various contexts and the factors that shape this.

1.3 SCOPE OF THE STUDY

The study to be carried out under this contract shall map and consolidate policy-relevant research findings on the contribution of gender equality towards a smart, sustainable and inclusive growth model in the EU.

¹⁸ EIGE (2014). Women and the Economy. Report.

¹⁹ <http://www.oecd.org/gender/closingthegap.htm>

²⁰ European Commission (2014). Gender equality in the workforce. *Reconciling work, private and family life in Europe*. Research project entitled 'Reconciling work, private and family life: production of statistical reports', consisting of six related Short Statistical Reports on: Barcelona childcare targets; labour force participation rates of men, women and parents; balancing work and family for lone parents; gender inequalities in the transition from school to work; share of earnings and domestic work within couples; and access to family-friendly working schedules.

The research question addressed in this study is: how economic benefits of gender equality can be measured? The research question is further refined as: what are the macro-economic benefits of gender equality? and what aspects of gender equality in the EU and under which circumstances are conducive to sustainable macroeconomic gains?

Macroeconomic benefits can go beyond GDP growth to include reduced unemployment, increased earnings, productivity gains, increased investment, increased productivity, innovation, performance and competitiveness.

The study shall focus on:

1. Clarification of the conceptual and theoretical framework(s) on the basis of existing research and available literature, and through the information on a variety of models developed to assess the impact of gender equality in the realm of macroeconomics.
2. Review of research methodologies (EU, Member States and international) to estimate the benefits of gender equality in the context of sustainable economic growth and productivity;
3. Selection of examples of specific methodological approaches from the EU Member States to illustrate the practical application of chosen methodologies for the estimation of the benefits of increasing gender equality in the context of macro economy and to provide initial evidence of those benefits. The examples from the area of labour market might include, but might not be limited to, studies focusing on:
 - The effects (positive, negative, qualitative and quantitative) to the economy/labour market generated by the (non)-participation of women in the labour market and a more/less effective use of human capital;
 - Effects between gender equality and economic development: women's greater economic independence affecting consumption, increasing tax revenues, sustainable system of social reproduction and poverty diminishment;
 - Effects on the economy/welfare support services caused by women's disengagement from the labour market throughout their lives and resulting in reduced pension entitlements;
 - Effects on women in terms of personal poverty of their not being fully attached to the labour market and not having full pension entitlements;
 - Effects of increase in women's bargaining power and the relation with gross domestic saving rates;
 - Effects on economic growth of policies devoted to reduce gender bias in the workplace & policies that decrease the cost of child rearing;
 - Effects of public social care expansion - via employment creation and redistribution of unpaid work to paid work – to sustainable and inclusive growth;
 - Effects and impact on growth of gender inequalities in literacy;
 - Effects of the decrease in gender inequality on economic growth and macroeconomic stability;

- Any research carried out in individual Member States to determine the impact of all of these factors on children, including in particular the children from female-headed lone parent families.
4. Proposal of a theoretical framework and a model for projection of benefits of gender equality which takes into account particular circumstances in Member States and the EU.
 5. Presentation of the model and the evidence on the economic benefits of gender equality for policy-makers by translating the evidence into clearly articulated arguments for non-specialist readers.

1.4 GENERAL OBJECTIVE

EIGE seeks to generate robust evidence on the macroeconomic and social benefits that enhanced gender equality provides to the EU Member States and the EU as a whole. The study will shed light on the ways in which increased women's economic empowerment can foster sustainable growth in the EU.

This study on *Economic Benefits of Gender Equality* is part of a wider programme on the Benefits of Gender Equality whose intended impact is to enhance research uptake by national and EU policy-makers. **The overall objective of this study is to strengthen the evidence base for informed policy-making on gender equality, particularly within the economic realm.** The intended impact is to foster investment in gender equality and the implementation of policies to improve gender equality, including economic outcomes and opportunities for women.

Collecting and disseminating evidence on the benefits of gender equality will help to promote gender equality in the EU and, subsequently, inform the funding, planning, and implementation of gender equality in all sectors and at all governmental levels.

Intended users of the study findings, conclusions and recommendations are EU and MS policy-makers, academia, gender equality advocates and practitioners.

1.5 SPECIFIC OBJECTIVES AND TASKS

The specific objectives of the study are:

Specific Objective 1: Generate robust evidence on the macroeconomic and social benefits that enhanced gender equality can provide to the EU Member States and the EU as a whole.
Specific Objective 2: Deepen the understanding of the complex ways in which gender equality and women's economic empowerment enhance sustainable growth and produce economic benefits at large.

The specific study outcomes and associated outputs are listed in the chart below, as follows,

OVERALL OBJECTIVE		
Strengthen the evidence base for informed policy-making on gender equality, particularly within the economic realm.		
Specific Objectives	Outcomes	Outputs
<p>Specific Objective 1</p> <p>Generate robust evidence on the macroeconomic benefits that enhanced gender equality can provide to the EU Member States and the EU as a whole.</p>	<p>Outcome 1</p> <p>Strengthened evidence base</p> <p>High quality knowledge-based research that is methodologically sound, scientifically valid and reviewed by a community of peers made available to a wider audience.</p>	<p>Output 1.1 Review, analysis and synthesis of relevant research literature on the macroeconomic returns of gender equality including the explanatory theories and the empirical methods used at Member States level.</p> <p>(Linked to: Activities 1.1.1-1.1.5 and products 1-2)</p>
		<p>Output 1.2 Selection of examples of specific methodological approaches from the EU Member States to illustrate the practical application of chosen methodologies to the estimation of the benefits of increasing gender equality in the context of macroeconomics, and to provide initial evidence of the benefits.</p> <p>(Linked to: Activities 1.2.1-1.2.2 and products 3-4)</p>
<p>Specific Objective 2</p> <p>Deepen the understanding of the complex ways in which gender</p>	<p>Outcome 2</p> <p>Enhanced evidence-based advocacy</p> <p>Policy-makers, researchers, gender equality advocates and practitioners better equipped to produce high-quality</p>	<p>Output 2.1 Proposal of a theoretical framework and a model to collect evidence of the economic benefits of gender equality.</p> <p>(Linked to: Activities 2.1.1-2.1.3 and products 5-6)</p>

<p>equality and women’s economic empowerment enhance sustainable growth and produce economic benefits for societies at large.</p>	<p>evidence; to engage at policy level in the promotion of effective policies for gender equality; and to communicate and disseminate research output to different constituencies.</p>	<p>Output 2.2 Assessment and testing of the empirical model. (Linked to: Activities 2.2.1-2.2.2 and products 7-8)</p>
	<p>Outcome 3 Better informed policy-making Increased knowledge of policy-makers of evidence-based policies that can improve gender equality.</p>	<p>Output 3.1 Preparation of specific knowledge-based communication products designed to (1) facilitate the dissemination and accessibility of the results of the study and (2) link empirical research findings to policy implications in a concise and comprehensive manner. (Linked to: Activities 3.1.1-3.1.2 and products 9-13)</p>

The tasks associated with the outputs of the study are:

Output 1.1 Review, analysis and synthesis of relevant research literature on the macroeconomic returns to gender equality including the explanatory theories and the empirical methods used at Member States level.

Activities

- 1.1.1 Description of the methodology for the literature and documentation review.
- 1.1.2 Clarification of concepts and methodological approach.
- 1.1.3 Collection of the relevant research literature and identification of experts in the area at Member State level.
- 1.1.4 Provision of an overview of the research literature on the economic benefits of gender equality in the EU, which includes detailed information on the theoretical frameworks and empirical methods used at Member State level.
- 1.1.5 Provision of a list of bibliographic resources addressing the topic at Member State level.

Products 1 - 2

Two different deliverables are due in Output 1.1, each one of them related to a specific format/product for information presentation and dissemination:

1. Country-case overviews in all Member States and at EU level on the economic benefits of Gender Equality: a compendium of relevant research literature, analysis and synthesis per country and at EU level, with detailed information on the theoretical frameworks and empirical methods used to assess the macroeconomic returns to gender equality. The overviews will consist of approximately 2-3 printable A4 pages. The contractor shall provide the country-case overviews as standalone products that will be published on line or in print by EIGE.
The contractor shall propose at least one possible design layout for the country overviews. To the extent possible the layout scheme will be replicated and applied consistently across the various reports of the same type. The proposals, based on the contractor's offer, will be fine-tuned and agreed between EIGE and the contractor.
2. Report summarising and clustering the evidence on the economic benefits of gender equality identified throughout the literature review process. In addition, the contractor shall include an analysis of the detected existing gaps in the evidence base. The report should include an annex explaining the context in which the work has been carried out, including a concise summary of the methodological work performed. The concepts, categories and terminology used should be in line with those of EIGE, except when well-founded alternatives are used and a sound justification for choosing these is provided. It shall include a list of bibliographic resources and experts on the topic at Member States and at EU level.

Output 1.2 Selection of examples of specific methodological approaches from the EU Member States to illustrate the practical application of chosen methodologies to the estimation of the benefits of increasing gender equality in the context of macroeconomics, and to provide initial evidence of the benefits.

Activities

1.2.1 Definition and justification of the methodology and criteria to choose the most relevant examples of specific methodological approaches from the EU Member States to illustrate the practical application of chosen methodologies to the estimation of the benefits of increasing gender equality in the context of macroeconomic, and to provide initial evidence of the benefits.

1.2.2 Organisation of an online discussion to discuss and validate the selection of the methodological approaches with relevant experts. The contractor is expected to prepare and organise an online discussion on EuroGender²¹, 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 the most relevant stakeholders for the exchange event, identification of a facilitator of the discussion and ensure management of the invitation process;
- Cooperation with EIGE's staff responsible for administration of EuroGender;
- Development of the 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.

²¹ **EIGE's online gender equality network – EuroGender**

The European Network on Gender Equality (EuroGender) 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.

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

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

Products 3 - 4

Two different deliverables are due in Output 1.2, each one of them related to a specific format/product for information presentation and dissemination:

3. Report presenting:
 - a) Concise summary of the methodological steps followed to select the relevant examples of specific methodological approaches to illustrate the practical application of chosen methodologies to the estimation of the economic benefits of increasing gender equality.
 - b) Overviews of the selected methodological approaches with detailed information on the theoretical frameworks and empirical methods used to assess the macroeconomic returns to gender equality, as well as the datasets. The overviews will consist of approximately 5 printable A4 pages. The contractor shall provide the overviews of the methodological-approaches as standalone products that will be published on line or in print by EIGE.
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 the present study and EIGE's work on the economic benefits of gender equality. The report shall be consistent with EIGE's reports from the previous online discussions:
 - Size of the report: min 5 max 8 pages (plus annexes, if any)
 - Deadline: within 3 weeks after the online discussion, 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.

Output 2.1 Proposal of a theoretical framework and a model to collect evidence of the economic benefits of gender equality at EU level.

Activities

2.1.1 Based on the research activities implemented under outputs 1.1 and 1.2, propose a theoretical framework for projection of the economic benefits of gender equality for the purpose of this research. The contractor shall explain and justify the approach taken.

2.1.2 In addition, development, presentation and explanation of how to convert the proposed theoretical framework into an empirical model designed for the empirical verification (economic case for gender equality in the EU), including the choice and explanation of variables, indicators and datasets this could include:

- Definition, organisation and presentation of an ideal list of statistics and indicators that would be required to describe, monitor and benchmark European Member States regarding an Economic case for Gender Equality;
- Definition of a set of feasible statistical indicators and identification of available data sources to describe, monitor and benchmark EU Member States in relation to the key theoretical components of an economic case for gender equality proposed;
- Identification of existing datasets and assessment of the adequacy of the European statistical infrastructure to provide the required statistical information;
- Definition, organisation and presentation of a shortlist of core, quantitative and available indicators, suitable for adoption in concise statistical publications and reports.

The contractor shall take into account the policy variation within countries and propose a methodological solution to overcome it within the theoretical and empirical model.

The proposed theoretical framework and empirical model should be discussed with experts in the field.

2.1.3 Organisation of a consultation meeting with the experts. Under this activity the contractor shall organise a 1 day meeting in Vilnius at EIGE premises. The expected number of participants is up to 15 experts, and EIGE's staff (4 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 experts in order to reflect on the proposed theoretical framework and model for projection of the economic benefits of gender equality at EU level. 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 justify how they were 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 an overview of the selected relevant examples of specific methodological approaches to illustrate the practical application of chosen methodologies to the estimation of the economic benefits of increasing gender equality (as per output 1.2)
 - Provide an overview of the proposed theoretical framework and model for projection of the economic benefits of gender equality for the purpose of this research.

Products 5 - 6

Two different deliverables are due in Output 2.1, each one of them related to a specific format/product for information presentation and dissemination:

5. A methodological report (theoretical framework and empirical model to monitor the Economic Case for Gender Equality) of about 20 pages (plus annexes) presenting information on:
 - Clarification of the key theoretical components of the proposed Economic Case for Gender Equality at EU level and methodological approach.
 - The main information needs and key aspects that are deemed to be relevant for a comparative statistical description/benchmarking of European countries with respect to the Economic Case for Gender Equality.
 - An ideal and organised set of indicators that would be required for such a comparative statistical description/benchmarking and its relation with the main information needs and key aspects to be covered.
 - Statistics and indicators currently available that could be used for the above mentioned purpose and their relation with the main information needs and key aspects to be covered.
 - Adequacy assessment of the currently available statistical information (including data gaps and quality/relevance issues as well as recommendation for improvement):
 - In addition to a more detailed analysis, the contractor shall provide a concise summary of the outcomes of the adequacy assessment, presenting the main information needs/key aspects to be covered, the ideally required statistics and indicators, the available statistics and indicators, the current limitations (availability, quality and relevance issues), the developments that would be required (including recommendations), the shortlist of core, quantitative and currently available indicators that will be used in next phases to produce concise statistical reports.
 - Identification of limitations and gaps in the current European statistical infrastructure to support further monitoring of the economic case for gender equality. The contractor shall consider that data quality issues will be found and will have to be managed (such as for instance breaks in series, unavailability of figures for EU aggregates, unreliability/unavailability of particular values for particular countries). The contractor shall therefore identify the most appropriate measures to deal with such issues in selecting, presenting, analysing and commenting the data.
 - An organised shortlist of about 20-25 core, quantitative and available indicators to be used in concise statistical reports and publications to bolster an economic case for gender equality.
6. Report of the Expert Group meeting: the contractor shall prepare a report of the consultation meeting. The report shall reflect on the issues discussed; outline the main results and challenges identified with regard to the proposed theoretical framework and model; list conclusions and provide recommendations and next steps planned with regard to further execution of EIGE's project.

- Size of the report: min 8 max 15 pages (plus annexes, if any).
- Deadline: After 3 weeks from the Expert Group meeting, 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.

Output 2.2 Assessment and testing of the empirical model.

Activities

2.2.1 Design and describe the methodology, steps and timelines to test the empirical model and explain how it would fit the objective of the research envisaged.

2.2.2 Test the empirical model, if feasible.

Products 7 - 8

7. A methodological report of about 20 pages plus annexes on how to test the model. The methodology shall cover the following parts:

- Description of the methodology to be applied for the data/sources of information selection, collection and statistical overview;
- Description of the conceptual and theoretical framework for modelling the economic case for gender equality;
- Description of the methodological approach and criteria for the selection of country case studies, with particular attention to balance and relevance in an EU context;
- Description of the methodological approach used for the analysis of collected information, in particular for the assessment of the macroeconomic case for gender equality; the analytic overview; and the country-case statistical overviews at national and European level.

8. Report of about 50 pages plus annexes on the short-and long term benefits of higher gender equality in the selected subsector where the empirical model might be tested.

Output 3.1 Preparation of specific knowledge-based communication products designed to (1) facilitate the dissemination and accessibility of the results of the study and (2) link empirical research findings to policy implications in a concise and comprehensive manner.

Activities

3.1.1 Using the results and analysis carried out by the project, the contractor shall present evidence on how the promotion and implementation of gender equality is “smart, sustainable and inclusive” and advances employment, innovation, education, poverty reduction, and environmental management as set out in EU2020.

3.1.2 Development of practical policy-orientated recommendations and proposals from the perspective of the EU policy objectives as set out in founding treaties, the Lisbon targets, the Barcelona targets, and the priorities and goals of Europe 2020 strategy.

Products 9 - 13

Five different deliverables are due in Output 3.1, each one of them related to a specific format/product for information presentation and dissemination. These products shall be targeted at EIGE’s stakeholders. The overview provided in the dissemination products should be clear and explicit and should be supported by relevant graphics/images. They should be supplied in a publishable form:

9. *Briefing paper*: drawing together the evidence from the research in the different (sub)sectors (i.e. labour market, care, poverty, ...), the contractor shall deliver a *briefing paper* on how improved and advanced gender equality has economic and social benefits. The contractor should use as a reference the principal policy drivers and frameworks of the EU. Ideally, the contractor would describe the evidence through the lens of the attainment of the Europe 2020 Strategy.
10. Three *factsheets* presenting the results of the study. The themes for the factsheets will be discussed and agreed upon in consultation with EIGE during the project implementation. They shall have a policy-orientated approach and present evidence and arguments for policy-makers on the benefits of ensuring and maintaining a focus on gender equality across policy, programmes and compliance measures within and generated by the EU institutions and Member States.
The factsheets shall be reader-friendly and written in an attractive, simple to understand form and language and aim at a wide audience.
Size: min 2 max 5 pages
Deadline: 30 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 factsheets to comment on them or approve. Within five (5) working days from receiving EIGE’s comments, the Contractor shall submit additional information and the final deliverable.
11. *Briefing paper* on the proposed theoretical framework and model to collect evidence of the economic benefits of gender equality at EU level.
12. *Factsheet* on the proposed theoretical framework and model to collect evidence of the economic benefits of gender equality. The contractor is expected to present the model in a non-academic style suitable for non-specialist readers.
13. *Executive summary* of the study:

- 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 on the Economic Benefits of Gender Equality at EU and Member States level.
- Size of the executive summary: min 10 max 15 pages (plus annexes)
- Deadline: 36 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.

1.6 METHODOLOGY

The methodological framework shall be developed by the contractor and shall provide a sound approach within the scope and time defined in these technical specifications. The tenderer shall propose a methodology which would ensure the achievement of the defined objectives and the collection of reliable information and data in the field. The tenderer shall clearly indicate how the relevant information (literature, documents, etc.) and data existing in any of the EU official languages will be identified, collected and analysed, and how the providers of data and information will be identified.

Tenderers shall propose a methodology to ensure the achievement of the defined objectives and the collection of reliable information and data for that purpose. Tenderers shall develop a methodological framework and provide a sound approach to the literature and documentation review, identification of methodological approaches and evidence, design of indicators, identification of data, data collection, data analysis and interpretation, information synthesis and evaluative conclusions, within the scope and time defined in these technical specifications.

The methods proposed in these specifications constitute a minimum requirement. The methodological points outlined below shall serve as a basis for further development. Tenderers are expected to develop a more elaborate proposal on specific methodologies described in detail in the technical offer. The final methodology for the study will be agreed upon and validated by EIGE in the validated inception report.

The study methodology shall cover the following parts:

- 1) Description of the methodology to be applied for the literature review and analysis which includes the pertaining explanatory theories and the empirical methods used at Member States level,
- 2) Description of the methodology to select the specific methodological approaches to illustrate the practical application of chosen methodologies,
- 3) Description of the methodology to propose a conceptual framework and model to collect evidence on the economic benefits of gender equality.
- 4) Description of the methodology to test the empirical model which shall cover the following parts:
 - Description of the proposed conceptual and theoretical framework for modelling the economic case for gender equality;
 - Description of the proposed empirical methodological approach to identify the benefits of increasing gender equality in the context of macroeconomics;
 - Description of the methodology to be applied for the data/sources of information selection, collection and statistical overview;
 - Description of the methodological approach and criteria for the selection of country case studies, with particular attention to balance and relevance in an EU context;
- 5) Description of the methodology to identify specific knowledge-based communication products to facilitate the dissemination and accessibility of the results of the study and link empirical research findings to policy implications.

Tenderers shall propose a methodology to ensure the achievement of the defined objectives and the collection of reliable information and data for that purpose.

Further requirements by EIGE are described under the sections of the technical specifications related to specific deliverables to be provided by the contractor.

1.7 DELIVERABLES

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

1. An Inception Report, summarising the discussion of the inception meeting (Week 3);
2. A First Interim Report on the first findings of the literature and documentation review, the collection of data and analysis, the country-case overviews, the online discussion, the progress so far and the next steps, and delivering annexed Products no. 1,2,3 and 4 (Week 10 for the interim report and Week 11 for the interim meeting);
3. A Second Interim Report with the proposal of a theoretical model and framework to collect evidence on the benefits of gender equality and on the experts consultation, and delivering annexed (Week 27 for the report and Week 29 for the meeting) – Products no. 5,6,7 and 8

4. A Final Report covering all the items described in specific objectives together with necessary annexes and the executive summary (Week 36); – Products no. 9,10,11,12 and 13.

Deadlines may be rescheduled during the inception meeting according to the agreed-upon work plan.

All the deliverables listed above must be submitted in high-quality English (UK). The reports must be written in a clear and simple way, providing information and analysis that can be understood by non-specialists. The reports and the executive summaries must be delivered in MS Word and PDF format. The format of annexes may vary depending on the type of information presented.

For the preparation of the deliverables, EIGE's guidelines on abbreviations, ordering of countries, referencing, text layout, editing, etc., must be taken into account. The guidelines will be provided to the Contractor at the inception meeting.

The final versions of all deliverables must be professionally edited²² and proofread²³. The documents must be delivered in an appropriate layout and they shall contain visual elements (e.g., tables and graphs).

All deliverables must be revised by the Contractor according to EIGE's recommendations, when necessary, and returned within the deadline mentioned in the Contract. When necessary, activities aimed at producing deliverables must run simultaneously to ensure smooth operation of the project within the given timeframe.

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

²² Copyediting. Specifically, these tasks include:

- Assessing the quality of the text (for completeness, accuracy, relevance and coherence)
- Editing/re-writing in clear and appropriate English (the originals at times, originate from either one or several authors, including both EIGE's staff and external researchers, with varying linguistic backgrounds)
- Resolving queries with the authors and EIGE's editorial team
- Identifying and inserting appropriate references/hypertext links
- Giving feedback about templates, guidelines and workflow procedures
- Ensuring overall transition from a non-native text to a native English text

²³ Proofreading. Specifically these tasks include:

- Proofreading texts (including all footnotes and/or endnotes, captions under photographs, lists, etc.) and insuring excellent English language, vocabulary, syntax, expression, grammar and relevant terminology
- Ensuring that no typographical errors are left in final texts
- Proofreading texts and verifying compliance with the house-style and the EU Inter-institutional Style Guide (published on the homepage of the Publications Office: http://www.publications.europa.eu/index_en.htm), and overall consistency with other texts in terms of format, structure and style
- Resolving queries with the authors
- Giving feedback on templates, guidelines and workflow procedures

All the reports with corresponding annexes must be provided in three hard copies and in an electronic copy, with the exception of the final deliverables (detailed analytical final report and executive summary), which must be provided in four hard copies and in an electronic copy.

DELIVERABLE	ANNEXES	WEEK
D1 Inception Report		W3
D2 First Interim Report	<p>Product 1 Country-case overviews</p> <p>Product 2 Report summarising and packing the evidence identified throughout the literature review process</p> <p>Product 3 Report on the selected methodological approaches</p> <p>Product 4 Report of the online discussion</p>	W10
D3 Second Interim Report	<p>Product 5 A methodological report (theoretical framework and empirical model to monitor the Economic Case for Gender Equality)</p> <p>Product 6 Report of the Expert Group Meeting</p> <p>Product 7 A methodological report on how to test the model</p> <p>Product 8 Report on the short-and long term-benefits of higher gender equality in the selected subsector where the empirical model might be tested</p>	W27
D4 Final Report	<p>Product 9 <i>Briefing paper</i> on how improved and advanced gender equality has economic and social benefits</p> <p>Product 10 Three <i>factsheets</i> presenting the results of the study</p> <p>Product 11 <i>Briefing paper</i> on the proposed theoretical framework and model</p> <p>Product 12 <i>Factsheet</i> on the proposed theoretical framework and model</p> <p>Product 13 <i>Executive summary</i> of the study</p>	W36

Deliverable 1: Inception meeting and Inception report (draft & validated)

Within two weeks of the contract signature, EIGE will organise an inception meeting with the contractor in Vilnius to discuss the Technical Specifications and the Contractor's offer. The project manager and the senior researcher(s) from the contractor's team shall attend the meeting.

In the inception meeting, the Contractor shall present in detail the methodology for documentation collection and analysis to be used, including key informants and actors, analytical tools, how the selection of examples of specific methodological approaches is going to be validated, and in particular, how the specific objectives and tasks will be implemented.

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

- The main findings of the preparatory work undertaken;
- A description of the methodology to be used and the challenges encountered (methodological choices & existing limitations);
- A proposed structure for the interim reports, final report, and all deliverables;
- An updated work plan ensuring the submission of the deliverables within the contractual deadline.

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

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

Size: between 30 and 40 pages and relevant annexes.

Language: Copy-edited and proofread English (UK)

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

Deliverable 2: First Interim report and meeting

The First Interim Report, showing the progress of the work undertaken to date and delivering items under outputs 1.1 and 1.2 and other complementary deliverables, shall be submitted to EIGE prior to the first interim meeting that will take place in Vilnius tentatively in W11 in order to present preliminary findings, outputs 1.1. and 1.2, and to discuss further details of the study.

The first interim report shall include the following, but not limited to:

- Definitions of the key terms and concepts;
- A description of the methodologies used;
- Overview of the research literature on the economic benefits of gender equality with detailed methodological information
- List of identified bibliographic resources
- The results of a first consultative meeting (online discussion) organized in the context of the participatory mechanisms for the study implementation;
- Review of the next deliverables format and structure;
- A presentation in ppt format reflecting the structure and content of this first Interim Report;
- An updated work-plan ensuring the submission of final deliverable reports, interim reports, and knowledge-based products within the contractual deadlines;
- A provisional structure for the project reports, knowledge-based products, etc. based on the contractors improved understanding of the study developed during the preliminary phase.

Annexes:

- Draft products listed under output 1.1. and 1.2- Products no.1,2,3 and 4
- Main bibliography used for desk research;

The Interim Report and its annexes shall provide final information covering outputs 1.1 and 1.2; and preliminary considerations about all other outputs, since output 1.1 and output 1.2 will provide with an opportunity to test the methodology and the validity of assumptions and concepts.

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

Size: minimum 50 pages and relevant annexes whose size has been described under section 1.5

Language: Copy-edited and proofread English (UK)

Deadline: (tentatively) 10 weeks after the date of signature of the contract, the contractor shall provide the first Interim report to EIGE and participate in the first interim meeting in Vilnius (W11). EIGE will have ten working days from receipt of the report to approve or comment. During the meeting the report findings and conclusions will be discussed, as well as current implementation progress and next steps.

Within ten days of receiving EIGE's comments, the contractor shall submit additional information and the Interim Report in its definitive form by electronic and regular mail.

Deliverable 3: Second Interim report and meeting

The Second Interim Report, showing the progress of work undertaken to date and delivering outputs 2.1 and 2.2 shall be submitted to EIGE two weeks (W27) prior to a second interim meeting that will take place in Vilnius tentatively in week 29 after the contract signature in order to present preliminary findings and to discuss next steps and further details of the study.

The second interim report shall include the following, but not limited to:

- Definitions of the new key terms, concepts and theoretical framework used for this phase;
- A description of the consolidated methodology used for this phase outputs;
- A description of the work in progress, challenges encountered and proposed solutions;
- Review of the next deliverables format and structure;
- The results of a second consultative meeting organized in the context of the participatory mechanisms for the study implementation;
- A visual presentation in a ppt format reflecting the structure and content of each of the reports annexed in this second Interim Report;
- An updated work-plan ensuring the submission of final deliverable reports, interim reports, and knowledge-based products within the contractual deadlines.

Annexes:

- Draft products listed under outputs 2.1 and 2.2 Products no. 5,6,7 and 8

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

Size: maximum 30 pages and relevant annexes whose size has been described under section 1.5

Language: Copy-edited and proofread English (UK)

Deadline: 27 weeks after the date of signature of the contract the contractor shall provide the interim report to EIGE and participate in the mid-term meeting in Vilnius (W29). EIGE will have ten working days from receipt of the report to approve or comment. Within ten days of receiving EIGE's comments, the contractor shall submit additional information and the second interim report in its definitive form by electronic and regular mail.

Deliverable 4: Final report and meeting

The final detailed analytical report shall be in line with the methodology proposed and agreed upon. It shall answer all the requests raised in the outcomes and the related tasks, as well as requests regarding the Final Report as agreed upon during the inception and interim

meetings. The analysis, conclusions and recommendations provided shall be clear and explicit. A final meeting will take place in Vilnius in order to present the findings of the study and the report, and to discuss the final details of the study.

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

- Executive summary (3-5 pages);
- Definitions of the key terms and concepts;
- Detailed description of the methodologies used;
- Overview of the research situation on economic benefits of gender equality in the 28 EU Member States (output 1.1);
- Overview summarising and clustering the evidence of the economic benefits of gender equality and existing gaps (output 1.1)
- Summary of methodologies (theoretical frameworks and empirical methods) to assess the economic benefits of gender equality (output 1.2)
- Overview of the model to assess the economic benefits of gender equality (output 2.1)
- Overview of the adequacy assessment of the currently available statistical information to support the further monitoring of the economic case for gender equality (output 2.1)
- Conclusions, evidence and policy-orientated recommendations based on the literature review and data analysis (output 3.1);
- A presentation in ppt format reflecting the structure and content of the Final Report;
- All the data collected and analysed presented in tables and graphs (as an annex);
- All the references and sources reviewed or consulted during the project (as an annex).

Annexes:

- Products listed under output 3.1- Products no 9,10,11,12,13 and 14

The Final Report shall cover the specific objectives 1-2, and tasks described under each output, listed under section 1.5, together with necessary statistical annexes. The Final Report shall include, among others, the following sections: Introduction; Executive Summary, Background; Methodology; Analysis covering all EU Member States; Conclusions and recommendations; Appendices; References.

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

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

Size: maximum 60 pages and relevant annexes whose size has been described under section 1.5

Language: Copy-edited and proofread English (UK)

Deadline: 40 weeks after the date of signature of the contract, the Contractor shall provide the final report to EIGE (a draft final report 36 weeks after and a final meeting to be held 39 weeks after the contract signature). EIGE will have 10 working days from receipt of the report to approve or comment. Within 10 days of receiving EIGE's comments, the Contractor shall submit additional information and the Final Report in its definitive form by electronic and regular mail.

The Contractor is expected to ensure smooth and efficient communication with EIGE after submission of the Final Report in case clarification regarding provided information is needed.

1.8 PROVISIONAL TIMELINE

Milestone	Week
Inception meeting	W2
Inception Report	W3
First Interim Report	W10
First Interim meeting	W11
Second Interim Report	W27
Second Interim Meeting	W29
Final Report	W36

The contract shall commence on the day following signature by EIGE as the last contracting party. The Contract is expected to be signed in October 2015. The duration of the tasks shall not exceed 10 months.

1.9 RESPONSIBILITY

The overall responsibility for executing the contract, including the implementation of all measures necessary to provide EIGE with deliverables of the highest quality on time, lies with the Contractor.

1.10 PROJECT TEAM

The organisation of the project team is a key feature and it is fundamental in order to deliver the expected results, in the defined timeline. The contractor is expected to organise its own project management and coordination team -the Project Team- lead by the Project Manager to oversee all aspects of work relating to the study.

The required experience of the project team shall be explicitly described in the CVs included in the tenderer's offer (as referred in section 2.4.3.B of the tender specifications). Tenderers are urged to pay special attention to ensure that the research team fulfils the requirements listed below in terms of qualifications and experience.

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

- knowledge of and expertise within 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 economics;
- knowledge of and expertise within the European Union’s policies and strategies on economics and labour economics and their implementation at EU and Member State level;
- expertise in economics, socio-economics, gender economics and gender budgeting;
- expertise in labour economics, public policy analysis and budget analysis;
- expertise in working with statistical databases and data, including micro-data and metadata;
- ability to assess the quality, measurability, reliability and comparability of data and interpretation of data;
- skills in collection and objective interpretation and analysis of data and information;
- expertise in the synthesis and analysis of large amounts of information;
- strong analytical and writing skills;
- skills in drafting analytical reports in a European context;
- very good command of English (UK);
- expertise in converting high specialised information into clearly articulated arguments and accessible messages for non-specialist readers;
- expertise in editing reports.

Project manager

The project manager is in charge of the coordination and administrative tasks of the project, as well as being responsible for contacting and informing EIGE about all aspects related to the execution of the contract. The project manager shall provide EIGE with frequent and regular updates on the progress of the study and other relevant aspects of the work.

The full team is responsible for the content and the quality of all the deliverables.

Research Team

The contractor must ensure that the research team fulfils the requirements listed above.

The team must have the prescribed minimum number of members as with the required professional profiles and may include further members if needed.

The research group should be composed by:

- Senior Researcher(s) and Junior Researcher(s) with specific skills in the fields above listed.

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

1.11 COMMUNICATION

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

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

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

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

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

The Contractor is expected to ensure smooth and efficient communication with EIGE during the contract life-span and for six months after the end of the contract. The project manager is expected to deliver to EIGE a short progress report every second week during the project implementation.

Contacts made with Member States to gather information should be fully documented and shared with EIGE.

1.12 MONITORING OF PROJECT IMPLEMENTATION AND QUALITY CONTROL

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

Deliverables shall be submitted according to the deadlines presented in sections 1.7 and 1.8. The documents must be delivered in an appropriate layout and they shall contain all aspects listed under section 1.7. The Interim reports, the Final report and the Summary report shall contain a page with signatures of the project manager, senior researchers and the editor,

confirming the content and quality of the deliverable meeting EIGE's standards (the format of this page will be provided by EIGE in the course of the project implementation).

EIGE's staff may, during the duration of the project, visit the Contractor's offices and/or the sites where the project is carried out to assess the quality of the work.

The Contractor shall expect that the European Court of Auditors and the European Anti-Fraud Office (OLAF) have the right to gain access to all documentation relating to the project and, therefore, must keep copies of all relevant and related documents.

2 THE TENDER

2.1 SUBMISSION OF THE TENDER

Participation in tendering procedures is open on equal terms to all natural and legal persons falling within the scope of the Treaties (this includes all economic operators registered in the EU and all EU citizens). Participation is also open to all natural and legal persons in any non-EU country which has an agreement with the European Union in the field of public procurement on the conditions laid down in that agreement.

Being launched by an EU Agency, this procurement procedure is not opened to the countries parties to GPA (except those mentioned in the previous paragraph).

Tenders must be submitted in accordance with the specific requirements of the Letter of Invitation to Tender and, without fail, within the deadlines laid down therein.

Late delivery will lead to the exclusion of the tender from the award procedure for this contract. Offers sent by e-mail or by fax will also be non-admissible. Envelopes found open at the opening session will also lead to non-admissibility of the tender. Consequently, tenderers must ensure that their bids are packed in such a way as to prevent any accidental opening during its mailing.

The tender must remain valid for a period of **6 months** from the final date for submission of the tenders.

This procedure is intended to be competitive. Any attempt by a tenderer to obtain confidential information, enter into unlawful agreements, collude or make arrangements with competitors, canvass or solicit EIGE staff or influence the evaluation committee or its individual members in any way during the tendering process will render tender invalid.

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

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

EIGE shall not reimburse expenses incurred in preparing and submitting tenders. No compensation may be claimed by tenderers whose tender has not been accepted, including when the Institute (the contracting authority) decides not to award the contract.

The Protocol on the Privileges and Immunities of the European Union shall apply to this invitation to tender.

2.2 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 criteria

Section Five: Financial offer

Standard submission forms are annexed to these specifications.

2.2.1 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.

2.2.2 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) of Article 106 of the Financial Regulation, 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) of Article 106 of the Financial Regulation, 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) of Article 106 of the Financial Regulation, 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.

2.2.3 SECTION THREE: SELECTION CRITERIA DOCUMENTATION

This part of the tender concerns the evidences relating to the economic and financial capacities, as well as technical and professional, capacities of the service provider(s) involved in the bid.

The proper implementation of the contract requires a multiplicity of skills, capacities and different types of expertise to be combined in the performance of the various tasks and activities.

An economic operator may rely on the capacities of other entities, regardless of the legal nature of the links which it has with them. It must in this case prove to EIGE that it will have at its disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place those resources at its disposal. EIGE may require that the economic operator and the entities referred to in this paragraph are jointly liable for the execution of the contract.

In the case of joint tender (consortium) or subcontracting, the technical and professional capacity shall be assessed in relation to the combined capacity of all the parties involved in the tender.

EIGE reserves the right to request additional information for the evaluation of the economic and financial capacity of each member of a consortium.

In case 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.

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.

2.2.3.1 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 480.000 during the past 3 years.

2.2.3.2 Technical and professional capacity required and their documentary presentation

The technical and professional capacity of the tenderers to provide the services required will be assessed with regard to their know-how, efficiency, effectiveness, experience, reliability in providing the required expertise.

The tenderer needs to demonstrate in the Offer the capacity to:

- set up the appropriate organisational structure to carry out all the tasks concerned with this contract and have a proven capacity to manage the administrative and financial aspects of such a contract;
- must demonstrate the capacity to liaise with the relevant parties in all Member States and at EU level;
- must demonstrate significant professional experience in a EU (or international) context, and, if needed, the capacity to rely on national competences and/or experiences to collect the necessary information for all 28 Member States;
- must demonstrate a high level of competency in written English.

In the case of joint offer (consortium) or subcontracting, the technical and professional capacity shall be assessed in relation to the combined capacity of all the parties involved in the tender.

Evidence of the technical and professional capacity shall be presented as indicated in Standard Submission Forms by the following:

- Reference list (including contact details) of minimum 5 and maximum 10 current and past costumers to whom the Tenderer has supplied services related to tasks described under this tender, in the past 5 years; describing the provided services and specifying the Tenderer's share in provision of the services.
- Samples of minimum one and maximum five EU and/or international projects implemented during last five years.
- The Curricula Vitae (CVs), preferably in a common European format, of the proposed members of the team (ref. 2.2.3.3.) must be enclosed and must clearly show evidence of the experience and skills required. The form can be downloaded from:

<http://europass.cedefop.europa.eu/europass/home/hornav/Downloads.csp>

The successful tenderer may be requested to provide the diplomas and professional qualifications of the persons responsible for providing the services, including any publications and/or studies and/or any other type of relevant work in the field that is the object of this contract.

2.2.3.3 Project team

The required experience of the team members should be explicitly reflected in their CVs, which are to be included in the tenderer's offer.

The tenderer should demonstrate experience of the team in using the chosen methodology for gender analysis.

- a project manager;
- at least five (5) researchers:
 - at least two (2) senior researchers in gender equality research and socio-economics;
 - at least three (3) researchers in economics, gender economics, labour economics, socio-economics, public policy analysis, budget analysis, and/or gender budgeting;
- at least one (1) economist with experience in social statistics, preferably in gender statistics;
- at least one (1) editor with experience in arranging, writing and editing the production of texts for publications.

Project manager

Qualifications and professional experience must include:

- university degree;
- minimum of five years of professional experience in project management;

- proven experience in research management, as manager or coordinator of at least three major international or European projects (preferably research), each involving at least three countries;
- proven experience in the area of gender equality;
- very good knowledge of English (Level C1 based on Europass CV model).

Senior researchers in gender equality research and socio-economics

Qualifications and professional experience must include:

- university degree in social sciences;
- proven experience in international or European research projects (at least two (2) projects are required);
- minimum of five (5) years of research experience in gender equality issues, preferably with experience working with gender economy;
- experience in public policy analysis work;
- at least four (4) publications (including articles or reports for research projects) on gender issues;
- very good knowledge of English (Level C1 based on Europass CV model).

Researchers in socio-economics and data analysis

Qualifications and professional experience must include:

- university degree in social sciences;
- proven experience in international or European research projects;
- minimum of five (5) years of research experience in data analysis/research and interpretation on gender equality issues, preferably with experience working with gender economics and gender budgeting;
- very good knowledge of English (Level C1 based on Europass CV model).

Economist

Qualifications and professional experience must include:

- university degree in economics, statistics, mathematics or social sciences;
- proven experience in international or European research projects;
- minimum of five (5) years of experience in data analysis in social statistics, preferably linked with gender statistics;
- experience in work with microdata and use of statistical software;
- very good knowledge of English (Level C1 based on Europass CV model).

Editor

Qualifications and professional experience must include:

- university degree or equivalent;
- minimum of five (5) years of experience in editing and proofreading in English;
- certified excellent knowledge of English (Level C2 or higher based on Europass CV model).

The team working on the project must possess strong analytical and drafting capacities. Knowledge of English shall be minimum Level C1 and for the Editor Level C2 based on the Common European Framework of Reference (CEFR).

2.2.4 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 Specifications will result in a very low technical score. The level of detail of the tender will be very important for the evaluation of the tender.

To grant equal treatment of all tenders, it is not possible to modify offers after their submission. As a consequence, incompleteness in this section can only result in negative impact for the evaluation of award criteria. Please note also, that offers deviating from the Technical Specifications may be rejected for non-conformity.

The Technical Specifications and the tenderer's bid shall be integral parts of the contract and will constitute annexes to the contract, while in case of contradictions the Technical Specifications prevail.

The tenderer must submit its Technical Offer which contains the tenderer's proposal to reach the objectives and fulfil objectives and tasks described in Sections 1.4 and 1.5 of these technical specifications, to establish and use the methodology as specified in Section 1.6 and to deliver high quality deliverables described in Sections 1.5 and 1.7.

The Technical Offer should refer to the award criteria described in Section 3 and should enable their application during the assessment procedure.

Tenderers must clearly show in their Technical Offer how they will ensure that the research will comply strictly with national and EU data protection legislation, especially Regulation (EC) No 45/2001 and Directive 1995/46/EC, as well as Regulation EC No 322/97 on the processing of data for statistical purposes.

If the tenderer intends to subcontract any part of the services, a description of the extent to which tasks will be sub-contracted, as to how subcontracting will be effectively monitored, must be provided.

In the Technical offer, the style and presentation must, as far as possible, be simple and clear, and free of jargon that obscures rather than promotes meaning to readers unfamiliar with it.

VARIANTS

Variants are not allowed.

Variant means a solution technically or economically equivalent to a model solution known to the contracting authority. Variants may relate to the whole contract or to certain parts or aspects of it.

2.2.5 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 240.000,00, excluding VAT. Tenders presenting a total price superior to this maximum amount will be excluded.

Tenderers must provide fixed price including all fees and project related costs (project management, quality control, back-up resources, etc) directly or indirectly connected with the provision of the service.

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

- The total number of days (person-days) each member of staff will contribute to the project;
- Professional fees should be expressed as the number of person-days multiplied by the unit price per working day for each expert proposed. The unit price should cover expert's fees and administrative expenditures;
- Other costs shall include direct costs such as travel costs, translation expenses, or other costs relative to the deliverables.
- For the organisation of the meetings under this contract the tenderer shall put a fixed maximum amount of € 5.000,00 for the online discussion (Activity 2 of output 1.2) and € 20.000,00 for the consultation meeting with experts (Activity 3 of output 2.1). 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 the Section 2.2.2 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 the Section 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 the Section 2.2.3 Selection criteria. All tenderers will undergo strict evaluation of conformity to the selection criteria established in the Tender Specifications. Tenderers not satisfying the selection criteria will not be selected and their offers will not be further evaluated against award criteria.

In case of joint offers or/and subcontracting:

- For 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 the 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 	10	6
	<ul style="list-style-type: none"> Soundness and appropriateness of the methodological approach for the implementation of tasks and the deliverables: 	10	6
	Methodology for review, analysis and synthesis of relevant research literature	15	9
	Methodology for selection of examples of methodological approaches	20	12
	Methodology for proposal of a theoretical framework and a model to assess the economic benefits of gender equality	5	3
	Methodology for the preparation of the knowledge-based communication products		
2	Project management, organisation of the project team and communication. Work plan & timeline	25	15
	<ul style="list-style-type: none"> Project team matrix (composition, organisation) 	10	6
	<ul style="list-style-type: none"> Project management flows and organisation 	10	6
	<ul style="list-style-type: none"> Work plan and timeline 	5	3
3	Quality assurance	15	9
	<ul style="list-style-type: none"> Quality or expected outcomes 		
	<ul style="list-style-type: none"> Quality of deliverables 		
	<ul style="list-style-type: none"> Quality of presentation and language 		
Total		100	60

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

1. Methodological approach

With 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 explain the way they are going to undertake the identification, review, analysis and synthesis of relevant research literature and how they are going to develop specific criteria for the selection of examples of methodological approaches. They are expected as well to explain how they will propose a theoretical framework and a model to assess the economic benefits of gender equality. The tenderers shall also address how the difficulties in the process, if any, will be tackled.

Tenderers shall explain clearly and convincingly how they are going to undertake the preparation of the knowledge-based communication products designed to facilitate the dissemination and accessibility of the results of the study.

Tenderers shall justify their proposed methodologies and must describe in detail their proposed approach to provide foreseen deliverables. The soundness and quality of the methodology and tools with regard to the expected deliverables will be assessed.

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

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 to 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 outcomes.

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

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

3. 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 either below the 60% per criterion or below 60 points out of total 100 points will be rejected and thus not be considered for the next step of the evaluation

The tender should elaborate on all points addressed by these specifications in order to score as many points as possible. If certain essential points of these specifications are not expressly covered by the tender, EIGE may decide to give a zero mark for the relevant qualitative award criteria.

B. Financial evaluation

The evaluation of Financial Offers is based on the total price.

3.3 AWARD OF THE CONTRACT

3.3.1 AWARD PRINCIPLE

The contract will be awarded to the most economically advantageous offer on the basis of the quality / price ratio, in accordance with the following formula:

Final score for Tender = Technical score x 100.000 / Price

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

3.3.2 INFORMATION TO TENDERERS

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.

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

award decisions 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 10 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 2.2.2. 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 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.

4.2 VOLUME OF THE CONTRACT

The maximum amount available for the contract is **240.000,00 EUR, excluding VAT**.

4.3 TERMS OF PAYMENT

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

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

4.4 GUARANTEES

No guarantees are required by the contract.

4.5 DATA PROTECTION

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