

## **B. TERMS OF REFERENCE**

### **Technical Assistance facility for gender-responsive and inclusive investments in the EU Neighbourhoods**

Reference number: AA-011587-001

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# 1 BACKGROUND INFORMATION

## 1.1 Partner country and promoter

Eastern Partnership Countries: Armenia, Azerbaijan, Georgia, Republic of Moldova, and Ukraine.

Southern Neighbourhood (Mediterranean Partner Countries): Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine<sup>1</sup>, and Tunisia.

Promoters are mostly public sector clients (Sovereign/sub-sovereign non-commercial); Some additional support to financial intermediaries (Banks, Financial Service Providers, Funds) in Eastern Partnership countries is also foreseen.

## 1.2 Contracting Authority

European Investment Bank  
98-100, Boulevard Konrad Adenauer  
L-2950, Luxembourg  
Grand Duchy of Luxembourg

## 1.3 Relevant background

The EIB group recognises that gender equality and women's economic empowerment, youth inclusion, social cohesion and social inclusion are all contributing factors to more resilient, peaceful, stable, and inclusive economies. The EIB seeks to advance progress in these areas through various types of investments across regions and sectors. EIB's Environmental and Social Sustainability Framework sets out the overall vision for such work and is complemented by a number of policies, strategies and procedures including EIB's Strategy on Gender Equality and Women's Economic Empowerment (adopted in 2016) and its subsequent Gender Action Plans; EIB Strategic Approach to Fragility and Conflict (2022); EIB's Operational Approach to Migration and Forced Displacement (2020).

Through EIB's investments across sectors, the Bank aims to contribute to closing gaps and advancing equality by providing women and girls and marginalized groups with:

- a) enhanced access to, use and benefit from, services and products that contribute to their social inclusion and help to narrow existing gender and social gaps;
- b) increased quality employment and leadership opportunities, and
- c) economic empowerment, by increasing financing available for women, youth, refugee or other identified target group entrepreneurs and business leaders.

Various context-specific socio-demographic characteristics including gender, age, ethnicity, disability, poverty are known to act as barriers to accessing and benefitting from services and opportunities generated by infrastructure investments. Furthermore, isolated, conflict-affected and fragile contexts see fewer investments in infrastructure and services overall.

More broadly, EIB has identified both demand side barriers, that is on the side of women and socially excluded individuals and regions, as well as supply side barriers, on the side of our clients, to promote gender responsive and socially inclusive investments. These barriers include:

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<sup>1</sup> This designation shall not be construed as recognition of a State of Palestine and is without prejudice to the individual positions of the Member States on this issue.

Table 1. Barriers to Gender Responsive and Socially Inclusive Infrastructure and Services			
Demand Side – Women & Socially Excluded Individuals		Supply Side – EIB Clients	
<b>Affordability</b>	New infrastructure services are not always <b>affordable</b> to socially excluded individuals or businesses. For example, initial energy grid connections charges and subsequent bills may be too high.	<b>Unviable Business Case</b>	Without access to grants or public subsidies making services more <b>affordable</b> is not always financially viable
<b>Accessibility</b>	There are <b>fewer infrastructure investments in areas where many underserved groups are located</b> , be it in rural regions or in urban informal settlements thus impeding on these individuals access to new services	<b>Limited geographical expansion</b>	The <b>perception of risk and economy of scale</b> limits interest in expanding into areas where underserved groups are located.
<b>Suitability</b>	Infrastructure services are often not designed for and adapted to the <b>specific needs of women</b> and socially excluded individuals. I.e. the design of public transport system often do not take into account women or primary care-givers unique travel patterns rendering the services less suitable for these individuals.	<b>Low knowledge and innovation</b>	There is limited availability of specific enough sector and project <b>social inclusion and gender analysis</b> to inform inclusive design and innovation
<b>Safety</b>	Infrastructure projects do commonly not pay sufficient attention to <b>safety concerns of excluded individuals and women</b> in particular resulting in that they may not benefit from the final service as much as they would have liked too.	<b>Homogenous Leadership</b>	The fact that most infrastructure sectors have <b>homogenous leadership</b> , often male dominated, limits the way service providers think about the design of their projects resulting in less inclusive design and implementation.
<b>Employability</b>	There are both perceived and real <b>barriers for women and socially excluded individuals in the labour market</b> . Ranging from social norms to lower level of education and experience, few jobs in underdeveloped areas and employment conditions not being suitable.	<b>Workforce diversification</b>	Cultural stigmas such as racism, perception of women being more family oriented makes <b>socially excluded individuals less demanded on the labour market</b> . In some cases, bringing people with lower education and experience levels may also be associated with additional costs and time.
<b>Social Norms</b>	Socially Excluded Individuals are often confronted with certain <b>cultural values or even legal restrictions</b> that impede their access to services	<b>Legal Restrictions</b>	Service providers may face <b>legal restrictions</b> in providing services to excluded individuals

On the other hand, the opportunities that gender responsive and socially inclusive approaches bring about are increasingly recognised. By seeking to expand diversity and by looking at the design of products and services from a social inclusion and gender equality lens, public actors and service providers have an opportunity to expand their customer base, increase sales, enhance customer satisfaction while improving financial and business performance. There is ample evidence showing how greater diversity in the workforce and in leadership positions is correlated with higher profitability, innovation and value creation.

To seize these opportunities and to overcome initial demand and supply side barriers, EIB clients often require substantive assistance to mainstream, develop and/or adapt project design for enhanced social impact, including through job creation. Whilst there is an increasing interest of project implementers to enhance their positive contribution to social inclusion, gender equality, economic resilience, conflict prevention, resilience building and reduction of fragility, EIB has noted significant capacity gaps in counterparts' abilities to develop and adapt project design in the ways needed to achieve such goals.

To meet these needs, the EIB has resources to provide such assistance to maximise project impact for social inclusion and gender equality implemented via two regional technical assistance trust funds that are outlined below. This facility will be fully integrated into the wider advisory trust funds to enhance the sustainability and impact of specific operations while also building a more strategic approach to gender and inclusion in project development and implementation.

#### **1.4 Eastern Partnership Technical Advisory Trust Fund (EPTATF)**

The Eastern Partnership Technical Advisory Trust Fund is a multi-donor multi-sector trust fund established by EIB in 2010 in response to the need for technical assistance support to the Bank's lending activities in the Eastern Partnership (EaP) Countries.<sup>2</sup> The EPTATF is a flexible mechanism to fill critical gaps for the development and implementation of investment projects by providing financing for pre-feasibility and feasibility studies, institutional and legal appraisals, Environmental and Social Impact Assessments for potential investments, of project management support and capacity building for the promoters during the implementation of investment projects, as well as of other upstream studies and horizontal activities.

Since inception, EPTATF-supported TA assignments have enabled or supported EIB lending amounting to some EUR 4.7bn and mobilised overall investment in EaP countries as high as EUR 10bn. Past EPTATF projects have been implemented in the energy (23%), transport (21%) water (18%), SME financing (15%), digital (5%) and municipal infrastructure (5%) sectors with climate action and environmental sustainability being a cross-cutting focus.

The EPTATF's priority focus for 2021-2027 will be to support primarily public sector clients in EaP countries in the areas of (i) Resilient, Sustainable and Integrated Economies (ii) Environmental and Climate Resilience; and (iii) Digital Transformation. Technical assistance will be used to ensure that operations are appropriately targeted, of good quality and are sustainable.

#### **1.5 Facility for Euro-Mediterranean Investment and Partnership Trust Fund (FEMIP TF)**

The FEMIP TF helps EIB overcome capacity and expertise gaps in the Mediterranean Partner Countries (MPCs) and to create the conditions for stronger engagement in the region. The FEMIP offers technical assistance to project development and implementation as well as for upstream advisory work. Since its establishment in 2004, FEMIP TF has allocated resources to support environmental objectives (28%), finance and SMEs (27%), infrastructure (20%), research, development and human capital (14%) and multi-sector projects (12%). Regional projects have been prioritised with the majority (58%) of operations receiving support having a regional focus.

The current strategic priorities for the FEMIP TF (2021-2025) are on (i) Human Development (ii) Resilience, Prosperity and the Digital Transition and (iii) Green Transition: Climate, Energy and Environment. This facility will support public sector clients with projects on social infrastructure and access to basic services, energy solutions, digital transformation and transport among others, as a basis for inclusive economic development and job creation. Ensuring that services are gender-responsive, create inclusive opportunities for all groups and address regional challenges including conflict, displacement and migration, vulnerability to climate change and persistent gender equalities will be critical for enabling sustainable investments.

## **2 OBJECTIVE, PURPOSE & EXPECTED RESULTS**

### **2.1 Overall objective**

The overall objective of the facility is to contribute to the general objectives of the EPTATF and FEMIP, that is to increase the quality and impact of EIB operations through the delivery of technical assistance services to project promoters and counterparts.

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<sup>2</sup> The Eastern Partnership (EaP) was launched in 2009 to strengthen political and economic relations between EU and EaP countries (Armenia, Azerbaijan, Belarus, Georgia, the Republic of Moldova, and Ukraine) and to support the latter to transform their economies.

## **2.2 Purpose/Specific objectives:**

The purpose of this facility is to enhance the social sustainability and impact of EIB funded operations in Eastern Partnership and Southern Neighbourhood countries through the provision of integrated technical assistance on gender and social inclusion.

## **2.3 Results to be achieved by the Service Provider:**

- EIB investments in infrastructure and services demonstrate a significant contribution to gender equality and inclusion, with enhanced access to and benefits from opportunities for women, girls and the most marginalised and socially excluded groups;
- Expanded employment, development and leadership opportunities for women and socially excluded groups that typically lack access to such opportunities through EIB support to (mostly) public and (limited private - financial sector) clients;
- Strengthened contributions of EIB investments to conflict prevention, resilience building and reduction of fragility by enhancing the application of a gender and conflict sensitive approach and addressing exclusion-driven grievances in fragile contexts;
- Enhance the EIB's knowledge base to help the Bank improve, anticipate, track, and learn from project impacts on social inclusion and gender equality.

## **3 ASSUMPTIONS & RISKS**

### **3.1 Assumptions underlying the project**

- Significant need for technical assistance on gender equality and social inclusion in the Trust Fund-supported operations. An indicative pipeline of the types of projects and needs was prepared throughout the development of this facility; it is assumed that such needs and demands will continue during the project period.
- Timeliness and relevance of inputs are able to inform and shape project preparation and implementation: This ToR includes a specific objective on needs identification, workflow management as well as the provision to provide support to other Service Providers to mainstream the inputs under this facility.

### **3.2 Risks**

- Changes in the political, financial, and economic environment: Such changes may have adverse impacts on the capacity of this facility to achieve its outcomes. Covering multiple regions, countries and assignments the facility may need to reorganize priorities and allocations in order to ensure effective use of funds within the project timeframe.
- Sufficient, relevant, and quality technical assistance available to meet demand: Necessary groundwork and most suitable procurement process will be established to meet the required scope and quality of technical support.

## **4 SCOPE OF THE WORK**

### **4.1 General**

#### **4.1.1 Description of the Technical Assistance Facility**

In order to enhance the positive social impacts of investments, EIB clients may need substantive technical assistance to develop and/or adapt product and/or project design for enhanced social impact. This entails identifying how EIB investments can best be targeted and structured, and projects most effectively designed to have long-term transformational effects on societies. Such effects relate to enhanced social sustainability and inclusion, gender equality, resilience, peace and security or other positive social impacts.

Accordingly, EIB is establishing a technical assistance facility for EIB financed projects or operations in Southern and Eastern Neighbourhood countries at feasibility, appraisal, and implementation stages to promote gender equality and social inclusion objectives. The successful Service Provider will therefore:

- Work closely with EIB staff and potential/current project promoters to explore opportunities, identify needs and secure and manage technical assistance, ensuring the most effective use of resources for project delivery and impact
- Provide technical assistance to selected projects – including gender and social inclusion analysis, action planning, implementation, and capacity support. This requires working directly with a range of public and private promoters, including financial intermediaries.
- Liaise with EIB partner, the European Training Foundation (ETF), who will provide technical support to promoters on a skills-based approach to social inclusion through EIB projects.
- The Service Provider will also be required to work closely with various technical assistance providers under FEMIP and EPTATF operations to ensure a consistent and integrated project approach to gender and social inclusion.
- Ensure effective knowledge management and learning across the assignments supported by the facility to enable the replication of gender and social inclusion efforts, including via an online knowledge platform.

Thematically, this service contract comprises two main inter-related components:

### **1. Gender equality and women's economic empowerment**

Gender equality is one of the founding values of the European Union, and a key objective of the Sustainable Development Goals (SDG 5). The EIB seeks to support gender equality and women's economic empowerment worldwide across a variety of sectors. EIB's Strategy on Gender Equality and Women's Economic Empowerment (adopted in 2016) and its subsequent Gender Action Plans guide EIB's work and embrace both the business and impact development case for gender equality.

The EIB Gender Strategy seeks to ensure that gender specific impacts, vulnerabilities and barriers that women and girls face are considered and addressed across EIB activities, so as to minimise any harm that they may generate in EIB operations; To promote the equal ability to access and utilise the assets, services, benefits and opportunities generated by EIB Group investments, regardless of sex, so as to maximise their positive impacts; and, to identify investment opportunities and markets that increase women's participation, on equal terms, in the economy and labour market.

As the EU Climate Bank, EIB has a dedicated focus on the gender-climate nexus aiming to empower women and promote diversity as drivers of climate action and sustainable change, building the resilience and adaptive capacity of women and those most impacted by climate change and using climate action and environmental sustainability investment to tackle existing inequalities.

Integrating gender equality considerations is a strategic priority across both Trust Funds. Direct or framework investments in sectors including energy, transport, water and digital will increasingly be designed and implemented to close identified gender gaps, to ensure that new services and products benefit women and/or that they expand women's employment and leadership opportunities. Due attention will be paid to minimise risks to women and girls to ensure that they are able to fully derive the benefits of such investments. Furthermore, in Eastern Partnership countries, work with financial intermediaries on access to finance for MSMEs will be used to strengthen women's leadership, entrepreneurship, and equitable quality employment opportunities.

#### **Scope of work on gender equality and women's empowerment**

To this end, the Service Provider will support EIB financed operations or operations under the Trust Funds at feasibility, appraisal, and implementation stages to deliver on gender equality and women's economic empowerment objectives. Specifically, the Service Provider will:

- Undertake gender analyses and needs assessments, including gender responsive design and gender market analysis to inform specific EIB's investments often with a climate action focus;
- Develop gender action plans and strategies related to specific EIB investments;
- Provide in-depth technical assistance to promoters (and in coordination with other TA providers) to implement actions within the investment projects to enhance their contribution to gender equality (such TA may focus on infrastructure design feature or human resource and employment policies or actions to build a more gender diverse pipeline for financial intermediaries, or address gender gaps such as harmful social norms and gender based violence for example);
- Coordinate with the ETF on their work strengthening client capacities on skills-based approaches for women's employment as part of the broader EIB offer.
- Develop tools and resources for EIB's gender-responsive investments in Neighbourhood regions including indicators / KPIs and monitoring framework.

The offer of assistance will primarily be provided to existing (and in some cases potential) EIB counterparts that have an operation under feasibility assessment or appraisal, or to existing counterparts on project implementation or monitoring.

## **2. Social inclusion, economic and climate resilience**

EIB supports social inclusion more broadly by working with its promoters to ensure that the products, services, and benefits generated by an EIB investment are gender-sensitive and reach segments of the population that tend to be socially and economically excluded. Such population groups vary by context but often face barriers to access opportunities and enjoyment of benefits due to a complex mix of norms, practices, and institutional barriers. Furthermore, EIB addresses inequalities by targeting geographical populations affected by conflict, fragility, climate change, and their related impacts, including migration and forced displacement.

These two approaches to inclusion and resilience-building are strongly intertwined: Indeed, a core element of the EIB's approach as the EU Climate Bank is to foster greater gender equality, social inclusion and climate resilience for people and communities that bear unequal burdens of climate change. Under its forthcoming "just resilience approach" the EIB is looking to further focus on climate adaptation actions that empower and support people (e.g., those that depend on natural resources for their livelihoods, indigenous people, women and migrants) and countries (Least Developed Countries, Small Island Developing States and fragile states) bearing unequal burdens of climate change.

On the other hand, there is also a need to ensure that the green transition and decarbonisation efforts driven by more ambitious climate mitigation policies and targets are just and leave no one behind. This includes having a focus on creating new economic opportunities for workers and communities and supporting municipalities and regions most affected by the phasing out of high carbon-emitting industries to find new more sustainable and inclusive development paths.

Similarly, EIB not only incorporates a gender and conflict sensitive approach into its operations but similarly invests in post-conflict contexts in ways that foster green and inclusive growth. This holistic approach to social inclusion enables EIB operations to identify synergies and navigate potential trade-offs regarding gender equality, migration, prevention of conflict and forced displacement.

### **Scope of work on social inclusion, economic and climate resilience**

Under this facility, EIB will work with public sector actors to integrate a gender-sensitive and social inclusion approach to infrastructure investment in sectors such as energy, mobility water, and municipal infrastructure. Such operations may include specific inclusive design measures or targeted interventions (by group or location) to increase access to social infrastructure and services and/or to benefit from employment opportunities. The targets for such interventions vary depending on the context but may include young people, older people, LGBTIQ+ persons, refugees, migrants, ethnic minorities, indigenous people, persons with disabilities, as well as populations in specific geographical locations affected by conflict, climate, and migration/displacement.

Technical assistance will be made available both during the preparatory stages as well as during the implementation and operational stages of a project to maximise the potential for social impact and may include the following.

- Undertake gender and social analysis and studies to inform project development, design and implementation (drawing on existing materials where available such as conflict sensitivity, gender, climate and migration analysis). Such studies may also require specific attention to potential social risks of EIB operations for vulnerable groups;
- Develop strategies and plans to narrow gaps and increase benefits to the identified target groups as relevant to the project i.e., improved access to services or inclusive employment opportunities;
- Provide in-depth technical assistance to promoters (and in coordination with other TA providers) to implement actions within the investment projects to enhance their contribution to gender equality, rights, equity and social inclusion (such TA may focus on more inclusive project processes, infrastructure design features or human resource and employment policies or actions to build pipelines for financial intermediaries that target specific groups that may be marginalized or excluded);
- Coordinate with the ETF as they design and implement skills-based approaches to social inclusion under the broader Facility;
- Develop tools and resources for EIB's socially inclusive investments in Neighbourhood regions including indicators / KPIs and monitoring framework.

#### **4.1.2 Geographical areas to be covered**

Armenia, Azerbaijan, Georgia, Republic of Moldova, and Ukraine.

Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine<sup>3</sup>, and Tunisia.

#### **4.1.3 Target groups**

The targets for such interventions vary depending on the context but may include women, young people, older people, refugees, migrants, ethnic and social minority groups, indigenous people, persons with disabilities or people located in specific remote geographical locations.

## **4.2 Specific activities**

Under the contract period spanning 36 months, EIB expects to identify a number of investments under the Trust Funds for which one or a combination of several of the tasks listed below will be performed. It is estimated that broadly there will be 2 levels of TA made available:

- 1) Analysis and action planning assignments taking around 40 person days to deliver or
- 2) Additional comprehensive packages of support of up to 80 person days to deliver depending on the nature and the scope of the tasks to be performed.

An indicative number of assignments under this facility would be 30 operations receiving gender/social analysis and action planning support, and a further 30 operations receiving an additional comprehensive package of technical assistance along the above lines.

For each assignment, terms of references outlining the purpose, scope of work, deliverables and timelines as well as the allocation of days, budget, travel needs and expert to deliver the assignment will be agreed upon between the assignment manager and the Service Provider. Depending on the scope of the assignment, it may cover one or more of the components outlined above, and one or several of the illustrative tasks listed under each of these objectives further below.

The successful achievement of the objectives of the Assignment involves the following activities:

#### **4.2.1 Inception phase (1 month):**

- Organise a **kick-off meeting** with the Assignment Manager and other relevant EIB staff working on gender equality and women's economic empowerment.
- **Familiarise oneself with the EIB's business model, focal areas and priorities** by reviewing the relevant background documentation provided by EIB, including:

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- **General strategy:** the EIB Group's Activity Report 2022<sup>2</sup>, EIB's Climate Bank Roadmap, EIB Lending Policies, sector lending policies and Relevant Strategic Orientation Notes.
  - **Gender equality and women's economic empowerment,** EIBG's Strategy and Action Plan on Gender Equality and Women's Economic Empowerment<sup>3</sup>, EIB Gender Tag Guidance Note, EIB Sector Practical Guidance to incorporate gender-based solutions into EIB operations, 2X Reference Guide, 2X Gender and Climate Finance Toolkit,
  - **Social sustainability and inclusion** EIB Environment and Social Sustainability Framework, EIB Approach to Human Rights; the EIB's Strategic Approach to Conflict and Fragility, External Paper on migration and the EIB;
  - **Trust Funds:** including EPTATF Strategic Priorities for 2021-2027, EPTATF 2010-2019 evaluation, and any other core documents outlining forthcoming TA to EaP operations; FEMIP TF Evaluation 2004-2022, FEMIP Strategic Orientations and Operational Plan 2021-2025.
  - **European Training Foundation:** Since the ETF is expected to be a key technical partner under this Facility, review ETF tools, offers and products that can be used to support capacity-building of EIB clients and work with EIB and ETF to develop integrated ways of working.
- Draft a concise **Inception Report**, including a proposed work plan for the assignment to be discussed and agreed with the Assignment Manager, and other relevant EIB staff working on gender equality (see reporting requirements in section 7.1).

#### **4.2.2 Activity 1: Support EIB to identify and prioritise opportunities for the delivery of increasing gender and social impact of operations.**

- Review the project pipelines for the Trust Funds and identify opportunities for technical assistance on gender equality and/or social inclusion;
- Work with promoters to discuss relevant areas of interest and capacity needs as a basis for developing specific assignments;
- Liaise with EU partners, such as the European Training Foundation, to incorporate relevant analysis and data and understand opportunities for collaboration, for example through integrating skills development in operations increasing gender opportunities and social impact;
- Elaborate appropriate and relevant TA assignments and secure the required skills and expertise to successfully achieve project objectives.
- Work with EIB staff to ensure that gender and social inclusion TA are well-integrated/coordinated with broader TA efforts for specific operations, including the need for work with other Service Providers where required.

#### **4.2.3 Activity 2: Undertake gender and social inclusion analysis for EIB Investments.**

Undertake gender and social inclusion analysis and gender responsive design analysis related to specific EIB investments in the following areas:

##### **General/upstream analytics**

For example:

- Country or regional gender and social analysis, including analysis of specific fragility drivers and sources of resilience in countries affected by fragility and conflict; adequacy of existing sector policies;
- Scenario planning / future proofing to identify vulnerabilities to future shocks or to emerging trends (e.g., climate or geo-political) and how these might be mitigated against via EIB operations.

**For direct or framework EIB investments with public sector clients (energy, transport, water, digital, etc.):**

- Research/analysis to understand existing gender equality/social inclusion gaps that affect individuals' access to the services/products/benefits generated by the project and any material gender or GBVH risks associated with the project;
- To identify project design features/development approaches for direct investments that can help close identified gaps in access to services/products/benefits generated or such features that can significantly contribute to gender equality and social inclusion and/or mitigate related adverse impacts and risks;
- To assess gaps and identify strategic opportunities to strengthen promoter capacities on gender-responsive projects, as well as potential support to suppliers in promoters' value chains that are able to amplify contributions to gender equality objectives.
- To understand current barriers and opportunities through direct investments to enhance quality employment and leadership opportunities for women and excluded groups in the context of an EIB investment;
- Articulate the business case for a project, including costs and benefits of proposed design features/project development approaches, to implement features that will substantially enhance gender equality and/or social inclusion including ex ante estimation analysis of potential social impact and its distributional effects. This can also include looking for possibilities and making recommendations for human capital development such as skilling, upskilling or reskilling of women/girls within the context of the investment/project leading to improved labour opportunities.

**For EIB investments in gender equality and women's empowerment via financial intermediaries (Banks, Financial Service Providers (FSPs), and Funds)**

- Research and analysis to identify gaps in access to finance, employment and other economic enablers that are likely to benefit women as well as market analysis, sizing and segmentation analysis; and
- Develop business cases for increasing lending/investments to MSMEs to support women's leadership, entrepreneurship and employment, including through recommendations for the development and roll-out of gender loan products and services (including digital) as well as context specific KPIs aligned with the 2X Challenge criteria.
- Explore ways to measure and/or estimate positive gender and development impacts of an EIB investment.

**4.2.4 Activity 3 - Develop gender and social inclusion action plans and strategies relating to EIB investments**

**For all client types:**

- Develop and/or provide inputs to gender and social inclusion action plans and strategies related to specific EIB investments.
- Provide practical and hands-on technical assistance on how to include project design features and operating concepts that can contribute to social inclusion and gender equality in the context of an EIB investment. The TA may cover how to support equal access to products/services generated by the project, inclusive employment opportunities including support to skilling/re-skilling or upskilling components within the framework of a loan/investment and should be informed by stakeholder engagement with the target groups and others to identify opportunities and barriers to inclusion and equality.
- Provide support to EIB clients to enable disaggregated data gathering and equality and inclusion monitoring and advise on ways to enhance the operation's tracking of business and development impact on social inclusion, gender equality and women's economic empowerment.

**For direct or framework EIB investments with public sector clients (energy, transport, water, digital, etc.):**

- Coordinate with the promoter and other service providers to ensure that specific risks and barriers to the engagement and inclusion of specific groups is well-integrated into broader project impact assessment and social management planning.

- Practical and hands-on technical assistance and capacity building on how to include project design features and operating concepts that can contribute to enhanced resilience, social cohesion and adaptive capacity of communities in the context of the project. This should be embedded in respective promoter-level procedures and guidelines that can continue to be applied beyond the life of the project to help reduce vulnerability to identified and forthcoming trends that risk having a negative social impact and of relevance to the broader social context.

**For EIB investments in gender equality and women’s empowerment via financial intermediaries (Banks, Financial Service providers (FSPs), and Funds)**

- Provide business, product development, pipeline building, guidance and capacity building to financial intermediaries to develop their gender based portfolio and expand their outreach to increase access to finance for women entrepreneurs or MSMEs that promote women’s quality employment and leadership opportunities. This may include financial or non-financial products and services or other products (e.g., targeted insurance services, launching dedicated women in business clubs) to enhance gender impact lending, including meeting the 2X Challenge criteria, market studies, marketing campaigns and providing financial literacy trainings and/or business development services to women entrepreneurs.

**4.2.5 Activity 4 - Provide technical support to project promoters to strengthen capacities for implementation of gender and social inclusion aspects**

- Provide specific technical assistance to project promoters to maximise social inclusion and gender equality impacts in projects through training, partnership facilitation and other mechanisms for the implementation of gender and social action plans developed under Objective 3.
- Support project promoters on inclusive and equal employment issues including through the development of corporate and human resources strategies, gender strategies and guidelines leadership development, gender and inclusion champions/mentoring or other initiatives and participation in decision-making for women and excluded groups, fair and equal pay and non-discrimination and build the long-term capacity of promoters/clients to address GBVH in their organizations.

**4.2.6 Activity 5 - Ensure effective knowledge management and learning across the assignments supported by the facility to enable the replication of gender and social inclusion efforts, including via an online knowledge platform**

- Develop and track KPIs/reporting on integration of social inclusion and gender equality across TA activities;
- Provide short learning pieces report on lessons learned on gender TA on sub-themes or topics to be agreed with EIB;
- Establish and manage an online knowledge platform for the initiative that facilitates EIB and promoter inputs, uptake and integration of learning efforts from the facility.
- Facilitate EIB knowledge-sharing and learning activities including cross-regional learning, as well as external relevant learning and peer experience sharing fora as requested.
- Propose an overall approach, workflow and prioritisation for future social inclusion and gender TA under the Trust Funds to enable maximum impact vis a vis resources;
- Provide a package of replicable ToRs for social inclusion and gender analysis and action plans that can be used for priority/high impact areas going forward; Document case studies and lessons learned by sector and by promoter to support wider gender and inclusion mainstreaming objectives at the EIB.

**4.3 Deliverables**

An assignment report will be submitted for each individual assignment.

Further reporting requirements are described in section 7.1 below.

#### **4.4 Project management**

##### **4.4.1 Responsible body**

The EIB, through the Consultant Procurement and Contract Management Unit (GLO/CGFA/ADV/CPCM), will act as the “**Contracting Authority**” and will be responsible for managing this TA operation. The Infrastructure Unit of the Advisory Services Division (GLO/CFGA/ADV/INFRA) (the “**Assignment Manager**”), in close coordination with the responsible loan officer(s) from the front-line department (GLO), will be responsible for the technical oversight of the operation.

##### **4.4.2 Management structure**

###### *Contracting Authority*

At the EIB, the Infrastructure Unit of the Advisory Services Division, in coordination with the front-line department, are responsible for management of the contract, with technical support from the Environment, Climate and Social Office of the Projects Directorate (PJ). The CPCM Unit is responsible for contractual and administrative matters.

###### *Service Provider*

The Service Provider should nominate a TA operation director (the “**Operation Director**”) from its head office with sufficient authority to sign the contract, commit the necessary resources, and to take overall responsibility for the performance of the consultancy team. The operation director should have a minimum of 10 years of professional experience at a level of senior responsibility and be fully fluent in English (CV to be submitted).

###### *Delegation of the European Union*

The Service Provider shall also liaise, as required, with the Delegation of the European Union in the beneficiary country as well as relevant EU agencies or bodies. Arrangements and procedures relating to such contacts shall be discussed with the Contracting Authority at the beginning of the assignment.

##### **4.4.3 Support to be provided by the Contracting Authority and/or other parties**

###### *Contracting Authority*

The Contracting Authority will provide the Service Provider, upon request, with all information relevant to the TA operation which is available to it and not covered by any confidentiality agreements and will fully cooperate with the Service Provider in order to achieve the best results.

###### *Promoter*

Promoters receiving technical assistance under this facility will sign a letter of agreement with the EIB demonstrating their support and engagement for each assignment. The Promoter undertakes to ensure that its employees co-operate at all times with the Bank and the Service Provider in relation to the provision of the Technical Assistance. The Promoter shall promptly provide the Service Provider with such information and documents at its disposal which may be relevant and necessary to the provision of the Technical Assistance. Such documents shall be returned to the Promoter on completion of the Technical Assistance.

The Service Provider may request the assistance of the Promoter in obtaining copies of local laws, regulations and information which may affect the Service Provider in the performance of its obligations under the Service Contract in the country where the services are to be provided.

The Service Provider might be exempt from direct and indirect taxes in certain countries as a result of this project financed through EC funds. The Service Provider should verify that this tax exemption applies to their activities with the relevant Government. The Promoter will be able to support the Service Provider regarding the administrative requirements upon his establishment in the relevant country. The EIB has no influence in this matter.

EIB benefits from VAT exemption on its purchases in Member States of the European Union; which means that the Service Provider’s activities performed in the EU (e.g., home office) can be exempt of VAT.

Subject to the laws and regulations on foreign labour in relevant country, the Promoter shall use its best endeavours to ensure that the Service Provider's employees and their dependants obtain the required visas and permits, including work and residence permits.

## 5 LOGISTICS AND TIMING

### 5.1 Location

The main location for this assignment will be the professional premises of the Service Provider, any such other location necessary for performance of the services or any such other location(s) as the Bank may reasonably indicate to the Service provider.

One Kick-off meeting and 2 annual review/learning meetings will be held in Luxembourg with the Team Leader and the Project Director.

The Service Provider will also undertake several visits to the place of selected assignments in the indicated countries.

### 5.2 Start date & period of implementation

The intended start date is May 2024 and the period of implementation of the contract will be 36 months from this date. Please see Articles 3 and 4 of the Special Conditions for the actual start date and period of implementation.

## 6 REQUIREMENTS

### 6.1 Staff

The Service Provider shall provide the adequate staff (in terms of expertise and time allocation) in order to complete efficiently all the activities required under the scope of the TA operation and to finally achieve the specific and the overall objectives of his contract in terms of time, costs and quality.

Note that civil servants and other staff of the public administration of the partner country or of international/ regional organisation based in the country cannot be recruited as experts, unless prior written approval has been obtained from the Contracting Authority, on a case-by-case basis.

The justification should be submitted with the tender and shall include information on the added value the expert will bring as well as proof that the expert is seconded or on personal leave.

#### 6.1.1 Key experts

The Service Provider shall submit an organisational chart of the team, including all key team members. In the case of consortium, the Consultant shall clarify which firm will be the Lead-Partner and how the relationship with other consortium members will be governed.

The Consultant shall provide a detailed description of its Team and of tasks to be performed by the Team Leader and each Team Member. The Team description will include all relevant details on the selection and experience of the proposed Team Members with regard to their tasks. The proposed Team should be fully committed and have a track-record and relevant experience to fulfil the necessary tasks.

Indicative profiles of key functional requirements the team should possess are provided below (point 6.1.1).

All experts who have a crucial role in implementing the contract are referred to as Key Experts (KEs). These terms of reference contain the required key experts' profiles. The tenderer shall submit CVs and Statements of Exclusivity and Availability for the following key experts:

#### **Key expert 1: Team Leader: Gender-equal and inclusive investments (Indicative minimum: 525 days)**

KE1 shall undertake the team leader role and will also be required to have technical experience as a senior gender and investment specialist. KE1 shall be responsible for the delivery of all services and deliverables under this TA operation contract.

KE1 will be responsible for coordinating, designing and validating Technical Assistance initiatives with EIB team and clients; mobilising TA initiatives with Non Key Experts ; coordinating the delivery

team; managing relationships with other EIB service providers conducting TA; overseeing knowledge management, learning and reporting (Section 7.1).

#### Qualifications and skills

- A graduate degree (at Masters level) in gender, social sciences, political sciences, economics, or in another relevant field.
- Full proficiency in English
- Knowledge of French and/or Arabic an advantage.

#### General professional experience

- 10 years of relevant working experience in social inclusion, gender equality and women's economic empowerment mainstreaming and strategy development for investment projects.
- 5 years of team management/coordination experience.

#### Specific professional experience

- 5 assignments on social inclusion and gender for financial institutions, such as IFIs, MDBs and EDFIs.
- 5 assignments working directly with public sector clients to build opportunities/generate demand for gender and social inclusion engagement.
- 3 assignments working with financial intermediary clients to build opportunities and generate demand for gender and social inclusion technical assistance.
- 3 assignments demonstrating client needs assessment, assignment development and workflow management on gender mainstreaming or social inclusion capacity support.

#### **Key expert 2: Gender/social inclusion expert – Southern Neighbourhood (Indicative minimum 450 days):**

KE2 will provide technical leadership to assignments under the FEMIP TF which will be with public sector clients (national/sub-national) in a range of sectors. Approximately 75% of assignments fall under the FEMIP TF, therefore the senior expert will need to provide technical guidance, support/supervision, oversight and quality assurance to a range of other experts, as well as supporting KE1 to finalize assignment ToRs and advise on technical expertise required to deliver.

#### Qualifications and skills

- A graduate degree in gender, social sciences, political sciences, economics, or in another relevant field.
- Full proficiency in English
- Working knowledge of French or Arabic.

#### General professional experience

- 10 years of relevant working experience on social inclusion and gender equality mainstreaming and strategy development for public sector infrastructure projects.

#### Specific professional experience

- 5 but preferably 8 assignments undertaking social inclusion and gender analysis and impact assessments for public sector infrastructure investment projects in the FEMIP TF countries of operation.
- 4 but preferably 7 assignments to develop social inclusion and gender action plans/strategies to increase accessibility/affordability/quality for socially excluded groups for investment projects in the sectors of the assignment (energy, transport, water, digital and municipal infrastructure, education).
- 4 but preferably 7 assignments to develop inclusive employment creation strategies for investment projects in the sectors of the assignment (energy, transport, water, digital and municipal infrastructure, education).

#### **Key expert 3: Gender/social inclusion expert – Eastern Neighbourhood (Indicative minimum 150 days):**

#### Qualifications and skills

- A graduate degree in gender, social sciences, political sciences, economics, or in another relevant field.
- Full proficiency in English

#### General professional experience

- 10 years of relevant working experience on social inclusion and gender equality mainstreaming and strategy development for public sector infrastructure projects.

#### Specific professional experience

- 5 assignments undertaking social inclusion and gender analysis and impact assessments for public sector infrastructure investment projects in EPTATF countries of operation.
- 4 assignments to develop social inclusion and gender action plans/strategies to increase accessibility/affordability/quality for socially excluded groups for investment projects in the sectors of the assignment (energy, transport, water, digital and municipal infrastructure).
- 4 assignments to develop inclusive employment creation strategies for investment projects in the sectors of the assignment (energy, transport, water, digital and municipal infrastructure).

### **Key expert 4: Gender and finance specialist – Southern Neighbourhood (indicative minimum: 100 days)**

#### Qualifications and skills

- A graduate degree in gender, social sciences, political sciences, economics, or in another relevant field.
- Full proficiency in English.

#### General professional experience

- 10 years of relevant working experience on gender equality and women's economic empowerment with public and/or private financial institutions.

#### Specific professional experience

- 4 assignments undertaking gender analysis and developing the gender business case for the financial sector with a focus on access to finance for MSMEs in EPTATF countries of operation.
- 4 assignments to prepare gender action plans/strategies for Banks and to develop diverse financial products for MSMEs that can drive women's leadership, entrepreneurship and employment.
- 4 assignments of advising and supporting financial intermediaries to increase their client base of women-led MSMEs through a range of services and support.

All experts must be independent and free from conflicts of interest in the responsibilities they take on.

#### **6.1.2 Non-key experts**

The Service Provider must select and hire other experts as required according to the profiles identified in the Organisation & Methodology in line with these Terms of Reference. It must clearly indicate the experts' profile so that the applicable daily fee rate in the budget breakdown is clear.

The recommended profiles of the non-key experts for this contract are indicated in the table below.

CVs for non-key experts should not be submitted in the tender but the tenderer will have to demonstrate, providing explanations on how these non-key experts can be selected and mobilised, in their offer that they have access to experts with the required profiles.

**All experts must be independent and free from conflicts of interest in the responsibilities they take on.**

The profile for each non-key expert (*category I, II or III*) must be indicated clearly, so as to be able to establish which fee rate in the budget breakdown will apply. For the purposes of this contract, the classification of the experts is entirely the decision of the Service Provider but should nevertheless be communicated to the Contracting Authority when requesting the approval of the experts, for contract management purposes.

The following categories of experts will be required for the implementation of the assignment:

*Category I – senior experts with international experience (indicative 500 days)*

Relevant university degree with at least 10 years of professional experience in their specific fields, including 5 years of international experience (i.e. outside their country of origin or permanent residence). Proficiency in oral and written English and French language would be an asset.

*Category II – senior experts with national experience (indicative 3,600 days)*

Relevant university degree with at least 10 years of professional experience in their specific fields. Proficiency in oral and written English.

*Category III – Junior expert (indicative 300 days)*

Relevant university degree with at least 2 years of professional experience in their specific fields. Proficiency in oral and written English.

The selection procedures used by the Service Provider to select these other experts must be transparent, and must be based on pre-defined criteria, including professional qualifications, language skills and work experience. The findings of the selection panel must be recorded.

The selected experts must be subject to approval by the Contracting Authority before the start of their implementation of tasks.

Indicative profiles identified of other experts for this contract are as follows:

- Gender, GBVH and Social Inclusion specialists
- Conflict and fragility specialists
- Governance and employment specialist
- Knowledge management specialist
- Communications specialist
- IT Specialist

### **6.1.3 Support staff & backstopping**

The Service Provider shall supply all support staff (administrators, secretaries, interpreters, and head office back-up, drivers etc.) as necessary for the proper fulfilment of his obligations. The costs of the support staff must be included in the fee rates of the experts.

Backstopping costs for logistical and management support (including the activity of the TA operation director designated by the Service Provider) of the team must be included in the fee rates of the experts.

The Service Provider should identify and describe in his offer the arrangements for the provision of the support staff and backstopping facilities.

**Note that the support/backstopping staff cannot be assigned as short or long-term experts while still maintaining their original assignment. The two responsibilities must be kept separate and double budgeting under the project should be avoided.**

## **6.2 Travel and associated costs**

As the majority of the activities are expected to be undertaken in the target countries, the experts may be based in the target countries or are expected to travel there frequently.

International transport and associated costs (travel costs; per diem,..) of Key and Non-Keys experts will be covered by the Incidental Expenditure budget.

Local travel (vehicles incl. drivers if considered necessary) for Key and Non-Keys experts while on mission in the target countries should be included in the fees.

### 6.3 Office accommodation

The costs of the office accommodation are to be covered by fee rates.

### 6.4 Facilities to be provided by the Service Provider

In principle, the costs of the facilities should be included in the tenderer's experts fee rates. The Service Provider must ensure that experts are adequately supported and equipped. In particular it must ensure that there is sufficient administrative, secretarial and interpreting provision to enable experts to concentrate on their primary responsibilities. It must also transfer funds as necessary to support their work under the contract and to ensure that its employees are paid regularly and in a timely fashion.

### 6.5 Equipment

No equipment is to be purchased on behalf of the Contracting Authority / partner country as part of this service contract or transferred to the Contracting Authority / promoter at the end of this contract. Any equipment related to this contract that is to be acquired by the promoter must be purchased by means of a separate supply tender procedure.

### 6.6 Incidental expenditure

The provision for incidental expenditure covers ancillary and exceptional eligible expenditure incurred under this contract. It cannot be used for costs that should be covered by the Service Provider as part of its fee rates, as defined above. Its use is governed by the provisions in the General Conditions and the notes in Budget form part of the Contract.

The provision for incidental expenditure for this contract is **EUR 300,000**. This amount must be included unchanged in the Budget breakdown.

It can be used to cover:

- a) Costs related to the development of the online knowledge platform for the initiative as described in activity 5;
- b) Outsourced upstream studies/analytics as agreed with the EIB
- c) Costs related to production of knowledge, visibility, communication and training materials, leaflets, booklets etc.
- d) Costs related to the organisation of awareness raising, training and outreach events, conferences (including costs for the rental of training/conference rooms and related equipment), or to the participation to relevant external (not organized by the Service Provider) events or conferences, including travel/accommodation expenses for project beneficiaries/promoters
- e) Translation costs of specific documents or reports, where requested by the promoter or deemed necessary by the EIB
- f) Travel costs and subsistence allowances for missions, outside the normal place of posting, undertaken as part of the assignment. Daily subsistence costs may be reimbursed for missions foreseen in these ToR or approved by the Contracting Authority, and carried out by the Consultants outside the normal place of posting. The *per diem* is a flat-rate maximum sum covering all daily subsistence costs. These include accommodation, meals, tips and local travel, including travel to and from the airport. Taxi fares are, therefore, covered by the *per diem*. *Per diem* are payable on the basis of the number of hours spent on the mission by the expert for missions carried out outside the expert's normal place of posting. The *per diem* is payable if the duration of the mission is 12 hours or more. The *per diem* may be paid in half or in full, with 12 hours = 50% of the *per diem* rate and 24 hours = 100% of the *per diem* rate. Any subsistence allowances to be paid for missions undertaken as part of each Contract must not exceed the *per diem* rates published on the website - [https://international-partnerships.ec.europa.eu/funding-and-technical-assistance/guidelines/managing-project/diem-rates\\_en](https://international-partnerships.ec.europa.eu/funding-and-technical-assistance/guidelines/managing-project/diem-rates_en) at the start of each such mission.
- g) Other expenses necessary for the completion of Activities 1-5 above.

Prior authorisation by the Contracting Authority for the use of the incidental expenditure is required.

## 6.7 Expenditure verification

The provision for expenditure verification covers the fees of the auditor charged with verifying the expenditure of this contract in order to proceed with the payment of any pre-financing instalments and/or interim payments.

The provision for expenditure verification for this contract is **EUR 30,000**. This amount must be included unchanged in the Budget breakdown.

This provision cannot be decreased but can be increased during execution of the contract.

## 7 REPORTS

### 7.1 Reporting requirements

Name of report	Content	Time of submission
Inception Report	Analysis of existing situation, needs assessment and work plan for the project	No later than 1 month after the start of implementation
Assignment reports	Report produced under the assignment, including analysis, plans and reports of specific activities such as training or capacity building.	No later than 1 month after the completion of the assignment. One draft should be provided for review by EIB team or else as agreed for the specific assignment.
Monthly briefing	Brief monthly update based on workplan and KPIs (dashboard/status update)	No later than 5 days after the end of the month.
Interim Progress Report	Description of progress (technical and financial) including problems encountered; planned work for the next 6 months accompanied by an invoice and the expenditure verification report.	No later than 1 month after the end of each 6-month implementation period.
Final Report	Detailed description of activities carried out recommendations	No later than 1 month after the end of the implementation period

The reports mentioned are described in more details as follow:

- **Inception Report** to be produced after one month from the start of implementation. In the report the Service Provider shall describe e.g., initial findings, progress in collecting data, needs assessment, challenges encountered or expected in addition to the work programme and staff travel. It shall confirm the aims of this technical assistance contract. If there are any proposed modifications to the original Terms of Reference due to changed circumstances after arrival on site, these are to be discussed and agreed in principle with the Contracting Authority and the Promoter before the submission of the Report.

This Report will describe the Service Provider's proposed establishment, personnel, and where they will be based, as well as the Service Provider's proposed approach to the project, taking into consideration the situation at the starting date of the assignment. It will also set out

a detailed work plan for completion of the activities in the remaining TA operation period of execution, together with a detailed work plan for interrelated, sequential and complex activities with an agreed project log-frame matrix. The expected achievement of the outputs listed in the Terms of Reference should be clearly identified, with any milestones, and the confirmation of the counterpart staff and other commitments to be made by the recipient counterparts. The inputs to support key activities in each beneficiary should be based on a thorough needs assessment taking account of individual circumstances.

- **Monthly briefing:** shall briefly describe the current status and progress of the activities under the contract and present the expected progress/milestones for the following month. The appropriate format shall be proposed by the Service Provider at draft inception report stage and agreed with the EIB. These MPRs should be concise and limited to 4 pages of main text maximum. The MRP are submitted for information only. The EIB may provide comments, but the MRP are not subject to approval.
- **Interim reports:** They shall consist of a written narrative section and a financial section. It shall briefly describe the current status of the project, in relation to technical progress; forecast the expected technical progress of the activities for the next period; itemise any outstanding issues that may result in extension of time or unforeseen costs; it describes the staff resources of the Service Provider and they deployment for the period covered by the report and indicate level of expenditure for the provision for expenditure verification.  
These interim reports should provide information on the state of progress of the project over the period, for ease of monitoring activities and outputs and should clearly distinguish between activities/outputs achieved and considered finished, and activities still in progress, so that the evaluation of the project is clear. The report will also include progress on the activities of all short-term consultancy assignments (with technical attachments as applicable).
- **Final report.** This report shall be submitted no later than one month after the end of the period of implementation of tasks. It shall consist of a narrative section. It shall, *inter alia*:
  - ✓ Describe the overall status of the project, including a critical study of any major problems which may have arisen during the performance of the project;
  - ✓ Final completion report including reporting against key indicators and KPIs for the TA facility;
  - ✓ Summary of assistance given to each project beneficiary;
  - ✓ Present any recommendations the Service Provider wishes to make in view of improving the design and implementation of any future similar activities;
  - ✓ Provide the full TA management package as agreed in the inception report.The report shall contain a sufficiently detailed description of the different options to permit an informed decision on any recommendations made. The detailed analyses underpinning these recommendations will be presented in annexes to the main report.

**All reports will be written in concise, clear and well-edited Standard English** All reports shall be produced in A4 size. The project reference shall be clearly identifiable in a header or footer. A list of essential contact persons is to be included. The reports should have a title page, which should include project name, project code or reference, report title, date issued, and period covered, and the name and address of the Service Provider. **The Contracting Authority shall provide the Service Provider, after the starting date of the assignment, with a recommended structure of the Reports.** The Service Provider may propose changes to this structure, which must be agreed with the Contracting Authority in advance.

## 7.2 Submission and approval of reports and deliverables.

All reports (draft or final versions) mentioned in chapter 7.1 above should be submitted in electronic version only and in English. Some assignment reports may need to be translated upon request by EIB, in such cases translation costs will be covered by the incidental expenditures.

The draft versions should be submitted to the EIB (CPCM, PJ and GLO department) which should have 15 calendar days to provide their comments.

Once all comments have been properly addressed, the final version of the report should be submitted for approval. The Contracting Authority (GLO/CFG/ADV/CPCM) is responsible for formally approving the reports.

Please also refer to Article 27.2 of the General conditions for the procedures and deadlines for the approval of reports.

In addition to the above-mentioned formal reports, the Service Provider shall provide such information on project progress as is reasonably required regarding political, economic or institutional developments of relevance to the project.

The Service Provider will follow the reporting instructions set up by the Contracting Authority as described in this document.

### **7.3 Invoicing**

According to the provisions of the General Conditions to the contract, the Interim Progress Reports represent the basis for the interim payments. The invoice should only be submitted to the TA officer and to [glo-cpcm-disbursements@eib.org](mailto:glo-cpcm-disbursements@eib.org) after the approval of the corresponding Interim report.

Furthermore, all invoices (except the request for the pre-financing payment) must be accompanied by the following:

- a financial progress report, covering the six-monthly interim period and containing details of the time inputs of the experts, and the incidental expenditures. The Financial report should include a detailed breakdown by financing source;
- an expenditure verification report (including the auditor's invoice which needs to indicate the services invoiced and the corresponding period of time) as defined in Article 28 of the General Conditions and in accordance with the template in Annex VII of the contract;
- the written EIB approval received from the TA officer for the above-mentioned reports.

**The contract has different financing sources (FEMIP and EPTATF) which must be invoiced separately. Instructions on invoicing will be given by the Contracting Authority**

### **7.4 Visibility requirements**

The Service Provider shall endeavour to publicise any work undertaken and to highlight the participation of the EPTATF and the FEMIP TF. The EIB LOGO should appear on the cover page of the reports and in the materials presented in the training workshops. The EIB LOGO may not be used for any other purpose.

The following text should also be included in the reports: *"This technical assistance operation is financed under the Eastern Partnership Technical Assistance Trust Fund (EPTATF) and the FEMIP Trust Fund.*

The following disclaimer should also be included: *"The authors take full responsibility for the contents of this report. The opinions expressed do not necessarily reflect the view of the European Investment Bank".*

## **8 MONITORING AND EVALUATION**

### **8.1 Definition of indicators**

Monitoring and evaluation indicators will be defined in the inception phase under Activity 1.

Specific performance measures chosen because they provide valid, useful, practical and comparable measures of progress towards achieving expected results. Can be quantitative: measures of quantity, including statistical statements; or qualitative: judgements and perception derived from subjective analysis.

### **8.2 Special requirements**

None.

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