



ANNEX II: TERMS OF REFERENCE

Consultant(s) to facilitate and develop the UfM's Strategy 2026-30 - 11 - PRO566CAB-2024

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1. BACKGROUND INFORMATION

1.1. Partner country

N/A

1.2. Contracting authority

Union for the Mediterranean (UfM)

1.3. Relevant background

1.3.1. The UfM strategic framework

The Union for the Mediterranean (UfM) is an intergovernmental organization that brings together 43 countries to enhance regional cooperation and dialogue through the implementation of concrete projects and initiatives. These efforts address inclusive and sustainable development, stability, and integration in the Euro-Mediterranean area. As a direct continuation of the Barcelona Process, the launch of the UfM in July 2008 was a true reflection of its Member States' shared political commitment to enhance the Euro-Mediterranean Partnership.

Since 2008, the UfM has reinforced the Euro-Mediterranean Partnership by introducing a more structured and pragmatic framework of cooperation that addresses the root causes of crises in line with the Joint Declaration of the Paris Summit for the Mediterranean (Paris, July 2008) and the Final Declaration of the UfM Ministerial Conference (Marseille, November 2008).

A first phase (2008–2011), under the Co-Presidency of France and Egypt, was dedicated to the launch of the UfM and the establishment of its Secretariat in Barcelona (hereafter referred to as the Secretariat).

A second phase (2012–2015), under the Co-Presidency of the European Union and Jordan, focused on the expansion and steady development of activities, the strengthening of the Secretariat's capacities, refinement of working methods and partnerships, and a number of achievements that revitalized Euro-Mediterranean regional cooperation.

A third phase (2015–2024) has focused on consolidating Euro-Mediterranean regional cooperation by building on the progress and identity of the UfM. This phase aims to develop a stronger common regional agenda to address pressing challenges and untapped opportunities in the Mediterranean region.

The 2015 review of the European Neighbourhood Policy reinforced the EU's commitment to strengthen the UfM. At the informal Ministerial Conference in Barcelona (November 2015), marking 20 years since the Barcelona Process, Ministers unanimously committed to deepen regional cooperation under the UfM framework, paving the way for the 2017 UfM Roadmap for Action.

This strategic document advanced regional commitment in four areas of action:

1. Enhancing political dialogue among Member States.
2. Ensuring UfM activities contribute to regional stability and human development.



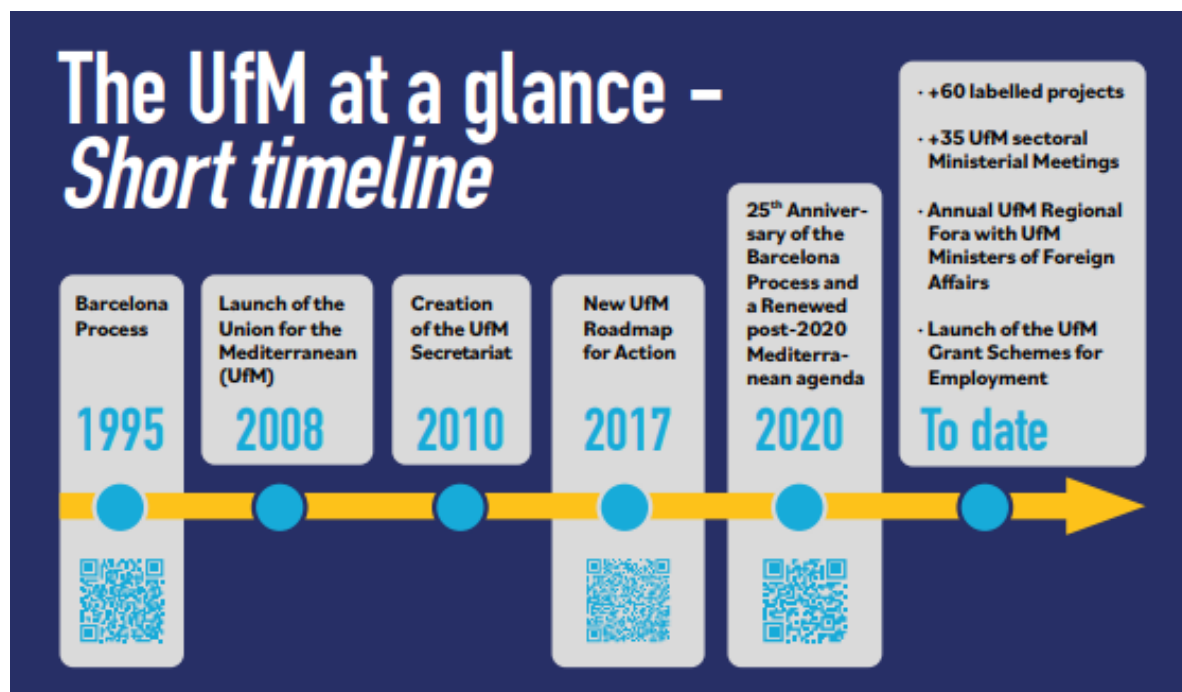
3. Strengthening regional integration.
4. Consolidating UfM's capacity for action.

The UfM and its Secretariat continue to operate under this Roadmap to this day.

In November 2020, on the 25th Anniversary of the Barcelona Process, UfM Member States recognized the need to prioritize, under the UfM Roadmap for Action, five key areas where the UfM can play a critical role and provide comparative advantages for a sustainable post-pandemic recovery. These priorities aim to foster more resilient societies and economies in the region:

1. Environmental and climate action.
2. Sustainable and inclusive economic and human development.
3. Social inclusiveness and equality.
4. Digital transformation.
5. Civil protection.

This review of priorities aligned with the preparations of the EU's "Renewed partnership with the Southern Neighbourhood A new Agenda for the Mediterranean 2021 – 2027".



All referenced documents can be found in the 'Institutional Documents' section, available here: <https://ufmsecretariat.org/info-center/publications/>

1.3.2. The ongoing reform process

At the 7th UfM Regional Forum in November 2022, several Member States called on the UfM Co-Presidency to use the occasion of the 15th anniversary of the organization to initiate a reflection on its role, functioning, and efficiency. Building on its experience and results, these discussions led to a consensus on the need to strengthen the UfM and its Secretariat, improve its working



modalities, and adapt its actions and resources to the current circumstances in the Mediterranean region and globally. Several papers, presentations, and statements from the Co-Presidency, the Secretariat, and Member States proposed constructive measures regarding the mandate, budget, and internal working procedures.

In line with these discussions, specific proposals to enhance the UfM's capacity for action and various measures to improve its efficiency were included in a reform package adopted in October 2023. This initiative aimed to pave the way for follow-up measures that would gradually strengthen the UfM and its capacities in the future.

Following the implementation of the first reform package, a second phase of the reform was launched in 2024, focusing on defining UfM's future priorities and vision. This phase included discussions among Member States about upcoming strategic goals, conducted through several Senior Officials' Meetings throughout the year, as well as written contributions responding to guiding questions posed by the Co-Presidency.

At the 10th UfM Regional Forum in October 2024, Member States agreed to task Senior Officials with using 2025 to review the 2017 UfM Roadmap for Action. The goal is to establish new priorities in light of the evolving geopolitical context and specific challenges in the Middle East.

Responding to that mandate, the UfM seeks to develop a new strategy 2026-2030, the key document that will define its mission and goals for the years to come.

* All working documents of the UfM reform are confidential and will be shared with the selected consultant(s) at the kick-off of the contract.

2. OBJECTIVES & EXPECTED OUTPUTS

2.1. Overall objective

The scope and focus of the assignment are to provide technical, strategic and facilitation support to enable the renewal of the UfM strategy 2026-2030, with ownership of the UfM Co-Presidency, member states, Secretariat, and stakeholders. This new Strategy will aim to:

- Giving direction to the organisation
- Enhancing governance and leadership
- Creating a vision that unifies the programmes and fostering cohesion
- Improving organisational effectiveness and promoting greater accountability for results
- Assisting in mobilising resources and resource-based planning
- Legitimising engagement with community-based, national, regional, and international partners
- Factoring in sustainability at all levels, among beneficiaries and within the organisation

2.2. Specific objective(s)

The specific objectives of this contract are as follows:

- Follow the consultation process at the level of member states and ensure coordination with the open consultation to be conducted in 2025 with partners, stakeholders and the larger community.
- Conduct and facilitate technical consultations/workshops on the specific priority areas emerging from the member states consultation.



- Review and analyse existing UfM strategic plans, sectoral mandates and programmes, and key documents related to the review of priorities.
- Develop initial draft of the UfM Strategy 2026-2030, incorporating all contributions.
- Coordinate the consolidation, review and validation of the draft through consultations with the UfM Co-Presidency and member states, in close guidance by the Cabinet of the UfM Secretary General.
- Ensure alignment of the Strategy with the ongoing preparations of the EU's new Pact for the Mediterranean
- Decline the strategy into a concrete operational action-plan, indicating resource needs, organisational development, and a MEAL framework.

2.3. Expected outputs to be achieved by the contractor

The expected outputs of this contract are as follows:

- An inception report outlining the steps and methodology to be used
- A report on document review and analysis. This report should aim to provide initial answers to the following questions and identify gaps that require further focus during consultations:
 - What is the key purpose of the UfM as an organization?*
 - Where does the UfM want to be in 2026-2030?*
 - What does the UfM want to achieve during this period?*
 - How will the UfM work to deliver its targets?*
 - How will the UfM get there?*
 - What are the risks the UfM might encounter and how will they be mitigated?*
 - How will the UfM know when it has achieved its goals?*
- At least three (3) technical consultative workshops focused on key priority areas
- Draft strategy for review and feedback, including executive summary, background, vision and mission statement, organisational values and guiding principles, strategic priorities, and methodology to achieve those strategic priorities
- Draft action plan, indicating resource needs, organisational development, and a MEAL framework, with concrete metrics to assess progress in the attainment of strategic priorities

3. ASSUMPTIONS & RISKS

3.1. Assumptions underlying the project

- Strong commitment and ownership of all relevant stakeholders within the UfM, including Co-Presidency and member states, to contribute to the consultation, review, consolidation and validation processes
- Availability and commitment of key UfM partners and external ecosystem to contribute to the consultation process
- Continuous support and collaboration from UfM member states and partners through the appropriate formats and channels
- Availability of required data and resources to complete outputs
- Validation and adoption of the final draft of the Strategy by UfM member states

3.2. Risks

- Delays in recruiting the consultant(s) could impact the project timeline.

- Resistance to change within member states, along with a lack of availability and political support for the development of the new strategic framework, could affect the successful facilitation of consultations and the overall project execution.
- The diverse socio-political landscape of UfM member states may present challenges to the consultation and implementation processes.
- Limited engagement from key partners could result in insufficient input or delayed timelines.
- Data and resource limitations, including the unavailability or lack of required data and resources, could impede the completion of critical outputs, affecting the quality and timeliness of deliverables.
- Challenges in validation and adoption may arise if UfM member states do not validate or adopt the final draft of the Strategy, delaying implementation, the development of the corresponding action plan, or requiring significant revisions to align with member states' priorities.

4. SCOPE OF THE WORK

4.1. General

4.1.1. Project description

The project aims at leading the process of the development of a new strategic plan for the UfM, covering the period of 2026-30.

4.1.2. Geographical area to be covered

The project will be conducted hybrid with a mix of remote and on-site work at the UfM Secretariat in Barcelona, Spain.

4.1.3. Target groups

The main target groups are UfM Co-Presidency, member states, Secretariat and key regional partners and stakeholders involved in Euro-Mediterranean cooperation.

4.2. Specific work

4.2.1. Review and analyse the UfM Strategic Framework

- Review the existing documentation: past vision documents (political declarations, roadmap...); sectoral mandates; strategic partnerships and programmes with UfM donors; ongoing consultation inputs (contributions by member states; inputs of policy experts and civil society at open consultation event of 14 February 2025, general public inputs through the Day of the Mediterranean campaign...).
- Analyse the prospects and developments of the EU's new Pact for the Mediterranean, as well as alignment with other key regional organisations' mandates.
- Identify key gaps, opportunities and recommendations that will inform the development of the UfM new Strategy and its accompanying action plan.

4.2.2. Facilitate external consultations

- Facilitate and coordinate the organisation of at least three subsequent consultation workshops, online, focusing on key strategic priorities retained at the open consultation of February 2025.
- Use these workshops to deepen exchange on identified gaps in the reflection.



4.2.3. Draft UfM Strategy 2026-2030

- Develop first draft of the UfM Strategy 2026-2030.
- Coordinate review and consolidation process to ensure delivery of a final draft ready for submission to member states.

4.2.4. Develop a corresponding action plan

- Decline the strategy into a concrete, realistic and operational action-plan, indicating clear, achievable and measurable goals, resource needs to accomplish those goals, organisational development, risk assessment and mitigation, and a progress tracking framework (MEAL).

4.2.5. Deliverables' Timeline

Main deliverables	Proposed timing
Inception report and document review and analysis report	March 2025
Focused consultations online workshops	April 2025
First draft of the UfM Strategy 2026-2030	End of April-May-Early 2025
Consolidated first draft of the UfM Strategy 2026-2030	1 st June 2025
Final draft of the UfM Strategy 2026-2030	October 2025
Action plan of the UfM Strategy 2026-2030	November 2025

4.3. Project management

4.3.1. Responsible body

The project will be managed by the Cabinet of the Secretary General of the UfM.

All issues related to the technical elements in relation to this contract, mainly the specific activities as outlined in sections 4.1 and 4.2. of these Terms of Reference, shall be taken by the project manager nominated by the contracting authority pursuant to special conditions of contract Article

2.1. The project manager will ensure these tasks in accordance with UfM internal rules and procedures

5. LOGISTICS AND TIMING

5.1. Location

The contractor may work remotelyThe consultant may be asked to attend follow-up SOM meetings when deemed necessary (locations tbd).

5.2. Start date & period of implementation

The intended start date is in March 2025 and the period of implementation of the contract will be 11 months from this date. Please see Articles 19.1 and 19.2 of the special conditions for the actual start date and period of implementation.

6. REQUIREMENTS

Tenders deviating from the requirements or not covering all minimum requirements described below may be rejected on the basis of non-compliance with the tender specifications and will not be further evaluated.



6.1. Staff

Note that civil servants and other staff of the public administration, of the partner country or of international/regional organisations based in the country, shall only be approved to work as experts if well justified. 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

Key experts have a crucial role in implementing the contract. 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:

Qualifications and Requirements:

- **Education:** Advanced degree in International Relations, Political Science, Public Policy, Development Studies, or a related field.
- **Experience:**
 - A minimum of 7-10 years of relevant professional experience in strategic planning, facilitation, and/or consultancy, ideally within international organisations, governmental, or regional entities.
 - Proven track record in facilitating high-level consultations and workshops, particularly in multi-stakeholder settings.
 - Experience in developing strategies and action plans for international or regional organizations, preferably in the Euro-Mediterranean area.
 - Knowledge of the UfM's structure, member states, and the Mediterranean region is highly desirable.
- **Skills:**
 - Strong facilitation, communication, and presentation skills.
 - Ability to work independently and manage multiple stakeholders.
 - Strong analytical and drafting skills with the ability to synthesize complex information and provide clear, actionable recommendations.
 - Proficiency in English is required; knowledge of other languages (e.g., French, Arabic) is an asset.
- **Other Requirements:**
 - Ability to work collaboratively in a diverse, multi-cultural environment.
 - Strong organisational and time management skills with attention to detail.
 - Proven capacity to work under tight deadlines and manage multiple deliverables.

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

The contractor shall ensure that all services will be provided and supported by appropriate expertise; methodology will be included in the offer.



6.2. Office accommodation

Costs for office accommodation for remote work are to be covered by the fee rates. For on-site work, office accommodation will be provided by the UfM Secretariat in Barcelona.

6.3. Facilities to be provided by the contractor

The contractor will ensure that the experts have access to all necessary resources, including communication tools and any required software, to complete their tasks effectively.

6.4. 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 / partner country at the end of this contract. Any equipment related to this contract that is to be acquired by the partner country must be purchased by means of a separate supply tender procedure.

6.5. 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 contractor as part of its fee rates, as defined above. Its use is governed by the provisions in general conditions and the notes in Annex V to the contract. It covers:

- Travel costs and subsistence allowances for missions, outside the normal place of posting, undertaken as part of this contract. If applicable, indicate whether the provision includes costs for environmental measures, for example CO₂ offsetting.

The provision for incidental expenditure for this contract is EUR 2,000.00. This amount must be included unchanged in the budget breakdown.

Per diem are daily subsistence allowances that may be reimbursed for missions foreseen in these terms of reference or approved by the Contracting Authority, carried out by the contractor's authorised experts outside the expert's normal place of posting. The per diem is a maximum fixed flat-rate covering 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. Per diem may only be paid in full or in half (no other fractions are possible). A full per diem shall be paid for each 24-hour period spent on mission. Half of a per diem shall be paid in case of a period of at least 12 hours but less than 24 hours spent on mission. No per diem should be paid for missions of less than 12 hours. Travelling time is to be regarded as part of the mission. Any subsistence allowances to be paid for missions undertaken as part of this contract must not exceed the per diem rates published on the website https://international-partnerships.ec.europa.eu/funding-and-technical-assistance/guidelines/managing-intervention/diem-rates_en - in force at the time of contract signature.

The contracting authority reserves the right to reject payment of per diem for time spent travelling if the most direct route and the most economical fare criteria have not been applied.

6.6. Lump sums

No lump sums are foreseen in this contract.

6.7. Expenditure verification

The provision for expenditure verification covers the fees of the auditor in charge of verifying the expenditure of this contract in order for the contracting authority to check that the invoices submitted are due. The provision for expenditure verification for this contract is EUR 1,000.00. 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

Please see Article 26 of the general conditions. There must be a final report, a final invoice and the financial report accompanied by an expenditure verification report at the end of the period of implementation of the tasks. The draft final report must be submitted at least one month before the end of the period of implementation of the tasks. Note that these interim and final reports are additional to any required in Section 4.2 of these terms of reference.

Each report must consist of a narrative section and a financial section. The financial section must contain details of the time inputs of the experts, incidental expenditure and expenditure verification.

To summarise, in addition to any documents, reports and deliverable specified under the duties and responsibilities of each key expert above, the contractor shall provide the following reports:

Name of report	Content	Time of submission
Inception report	Detailed work plan, methodology, and description of how the findings of the documentation review and analysis will be incorporated into the project, accompanied by an invoice and the expenditure verification report.	No later than 1 month after the start of implementation
Interim report	Short description of progress against the achievement of the results, challenges encountered, and plans for the next period, accompanied by an invoice and the expenditure verification report.	No later than 5 months after the start of implementation
Draft final report	Short description of the achievement of the results. The final draft report should include a description of the outstanding tasks, problems encountered, and recommendations.	No later than 1 month before the end of the implementation period.



Final report	Short description of the achievement of the results. The final report should include a description of the problems encountered and recommendations; a final invoice and the financial report accompanied by the expenditure verification report.	Within 15 days of receiving comments on the draft final report from the project manager identified in the contract.
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7.2. Submission & approval of reports

1 copy of the reports referred to above must be submitted to the project manager identified in the contract. The reports must be written in English. The project manager is responsible for approving the reports.

8. MONITORING AND EVALUATION

8.1. Definition of indicators

- Delivery of a complete and comprehensive documentation review and analysis of the UfMS Strategic Framework.
- Delivery of a consolidated UfM Strategy 2026-2030, including feedback and review inputs.
- Delivery and positive feedback from the online consultation workshops.
- Delivery of an accompanying action plan, in line with requirements indicated in these TORs.

8.2. Special requirements

The contractor must ensure that all activities comply with relevant visibility and communication guidelines, provided by UfM during the inception phase. Additionally, the contractor should apply a participatory approach, ensuring that all stakeholders are adequately consulted and engaged throughout the project.