



ANNEX II: TERMS OF REFERENCE

RBM-MEL trainings and technical support to UfM under Sida cooperation - 14 - PRO563DOP-2024

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1. BACKGROUND INFORMATION

1.1. Partner country

N/A

1.2. Contracting Authority

Secretariat of the Union for the Mediterranean (UfM)

1.3. Relevant background

Background Information

The Union for the Mediterranean (UfM) is an intergovernmental organisation bringing together the 27 European Union Member States and 16 countries from the Southern and Eastern shores of the Mediterranean. It provides a unique forum to enhance regional cooperation and dialogue in the Euro-Mediterranean region.

The Secretariat of the Union for the Mediterranean (UfM), based in Barcelona, is composed by 70 staff members from more than 15 nationalities and is the first permanent structure dedicated to the intergovernmental Mediterranean partnership. It is therefore the operational institution that empowers this regional dialogue between the UfM Member States and stakeholders, fostering synergies among them and promoting cooperation projects and initiatives with a direct impact on the lives of people.

The UfM gathers the 43 Member States' representatives together on a regular basis. It serves as a framework for policy dialogue and exchange of project ideas, experiences and best practices among governments, key international institutions and cooperation structures. The UfM provides a unique platform to formulate regional priorities and decide on specific cooperation initiatives to be put in place.

UfM – Sida cooperation

The first Cooperation Agreement between the Swedish International Development Cooperation Agency (Sida) and UfM was signed in January 2017 for 4 years (2017-2020) period and then extended in July 2020 for an additional period of 2 years (till December 2022) with a total budget equivalent to € 8,1 million over the 6-year period.

This Cooperation Agreement encompassed a core support to the UfM activities as well as a dedicated support to the regional water agenda implemented in collaboration with GWP-Med (Forwarding of funds).

In December 2021, to secure the continuity of the financial contribution of Sida, a new agreement covering the period 2022-2025 was signed, with a total budget equivalent to € 4,9 million over the 4-year period.

A new feature in this cooperation is the change in terms of philosophy of intervention, moving from an operating grant to a programmatic approach. The cooperation between Sida and the UfM for the 2022-2025 period consists in a programme designed from a Results-Based Management (RBM) and



Monitoring-Evaluation-Learning (MEL) perspective, compatible with the mandate of the UfM and the UfM yearly work-programs, geared towards increasing the efficiency of the UfM in delivering impact in the region. Through this process an enhanced coordination and interaction between divisions is facilitated and synergies built.

The Cooperation with Sida aims at enhancing and amplifying UfM regional activities in the MENA countries, in three priority areas of common interest:

- 1) Women Empowerment
- 2) Water, Environment and Blue Economy
- 3) Energy and Climate Action

In the framework of the extended cooperation agreement signed between Sida and the UfM in December 2021, the year 2022 served as an inception phase to prepare for the implementation of programme components as from 2023, which in operational terms was the first year of implementation of the agreement. Following the incorporation of a MEL analyst, 2024 was the opportunity to implement the first dedicated trainings on RBM-MEL for the UfM staff, supported by an external consultancy. The first training took place in March 2024 and trained 17 UfM staff dedicated to the Sida Programme and a second training in June 2024 allowed to deepen the first training for 16 UfM staff.

2. OBJECTIVE, PURPOSE & EXPECTED RESULTS

2.1. Overall objective

The present contract aims to ensure the provision of services (needs assessment, trainings, technical, support and benchmarking) in order to support the UfM applying Results Based Management (RBM) and Monitoring, Evaluation and Learning (MEL) in the implementation of the Sida programme 2022-2025 and beyond. The specific nature of the UfM Secretariat, its staff categories (seconded, contracted) and fluctuation of staff, shall be considered and services provided should be tailored accordingly, to deliver value to the UfM, given its unique character and mandate.

2.2. Purpose

The aim of this contract is twofold:

- (i) enhance the knowledge, understanding, skills and capability of UfM Staff, including seconded staff, to implement RBM and MEL in the UfM
- (ii) Provide technical support to the UfM MEL analyst

The services will be provided upon request by the UfM through Administrative Orders (issued by e-mail). The number and content of orders issued will depend on the needs of UfM.

2.3. Results to be achieved by the Contractor

Ensure, through trainings, that RBM and MEL knowledge, understanding, skills and capability are enhanced and applied by UfM staff in implementing the Sida-UfM programme and beyond. Provide support, including technical support to the UfM MEL analyst.



3. ASSUMPTIONS & RISKS

3.1. Assumptions underlying the project

Most of the UfM team involved in the Sida-UfM programme have received training on RBM and MEL. This includes approx. 10 days equivalent of support in 2022 and 4 full days of training in 2024, covering fundamentals, baseline setup, and practical applications. As a result, about 20 staff members have basic knowledge and skills in RBM-MEL.

The training foreseen in March 2025 (Activity 3) will include diplomatic staff seconded to the UfM at the management level, new to RBM-MEL concepts that have not participated in the previous trainings mentioned. It is then expected that for Activity 3 the training is tailored for the purposes of using RBM-MEL at the management level, considering the strategic priorities faced by the diplomatic staff seconded to the UfM at the management level.

The training foreseen in July 2025 (Activity 5) will include both UfM staff trained in 2022 and 2024 (mostly UfM contractual staff) and other UfM staff new to RBM-MEL concepts. It is therefore expected that the training under Activity 5 will include different levels of knowledge of the RBM-MEL approach identified through the needs assessment (Activity 4) and that accordingly, the training will allow to enhance the individual and global capacity to implement RBM and MEL. .

3.2. Risks

- Availability and engagement of UfM staff.
- Adapting RBM-MEL trainings to the perspective of diplomatic staff seconded to the UfM at the management level.

4. SCOPE OF THE WORK

4.1. Specific work

Services shall be provided upon request and tracked by both UfM and the Contractor.

The expected activities are as follows:

- **Activity 1 (April 2025):** Touch base meeting to consolidate the proposed activities in close coordination with UfM and drafting of an inception report.

Expected Output Activity 1: Inception report including, *inter alia* the scope of the assignment; its limitations; description of the activities 2, 3, 4, 5, 6; team of experts including CV and relevant experience; timeline.

- **Activity 2 (May 2025):** Development of a needs assessment in cooperation with the UfM to identify the training needs in terms of RBM-MEL knowledge and capacity from the designated management staff seconded to the UfM

Expected Output Activity 2: Carry out up to 10 different video teleconference (vtc) meetings with the designated management staff of the UfM to draft a needs assessment report identifying the scope and range of the needs in terms of knowledge and capacity in implementing RBM-MEL from a perspective of diplomatic staff seconded to the UfM at the management level. The needs assessment report shall be the basis for developing the content of the training under Activity 3.



- **Activity 3 (June 2025):** based on the needs assessment report (activity 2) deliver a tailored in person training of one (1) day to seconded management staff of the UfM. The training will focus on strategic discussions to increase the level of knowledge, understanding and skills to implement RBM-MEL in the UfM.

Expected Output Activity 3: Based on the needs assessment report, five (5) hours of in person classroom training to be delivered to the management staff of the UfM (up to 10 participants) in one (1) day in a suitable venue in Barcelona area (Spain). The training shall be focused on strategic discussions that increase the level of knowledge, understanding and practical skills in implementing RBM-MEL in the UfM using the existing MEL tools and methodology from the perspective of diplomatic staff seconded to the UfM at the management level. Training material (programme, Power Point presentations and other documentation) shall be shared with the UfM Project Manager in advance. Attendance shall be recorded.

The following services shall be provided for up to ten (10) participants under this contract:

- Development of training content including a detailed programme to be shared with the MEL analyst at least two (2) weeks before the date of the training
 - Delivery of in-person training (5 hours in one day)
 - Transportation and transport logistics
 - Rental of the training venue in a four-star hotel or equivalent in Barcelona area (Spain) including a room with windows and natural light, with the necessary furniture and IT devices to implement the training (projector, HDMI cable, etc.).
 - Meals for one (1) day (1 lunch, 1 coffee break)
 - A report will be provided on the results achieved during this training.
- **Activity 4 (May 2025):** Development of needs assessment in cooperation with the UfM to identify the training needs in terms of RBM-MEL knowledge and capacity from the designated UfM staff.
Expected Output Activity 4: Carry out at least 10 different vtc meetings with the designated project management staff of the UfM to draft a needs assessment report identifying the scope and range of the needs in terms of knowledge and capacity in implementing RBM-MEL from a project manager perspective. The needs assessment report shall be the basis for developing the content of the training under Activity 5.
- **Activity 5 (July 2025):** based on the needs assessment report (activity 4) deliver tailored training of two (2) days to UfM staff. The training shall be focused on increasing the level of knowledge, understanding, skills and capability to implement RBM-MEL in the UfM.
Expected Output Activity 5: Based on the needs assessment report, ten (10) hours of in person classroom training to the UfM staff (up to 25 staff members) to be delivered in two (2) days in a suitable venue in Barcelona area (Spain). The training shall increase the skills and capability in RBM-MEL in the UfM using the existing MEL tool and methodology. Training material (programme, Power Point presentations and other documentation) shall be shared with the UfM Project Manager in advance. Attendance shall be recorded.

The following services are to be provided for up to twenty-five (25) participants under this contract:



- Development of training content including a detailed programme to be shared with the MEL analyst at least two (2) weeks before the date of the training
 - Delivery of in-person training (10 hours in 2 days)
 - Transportation and transport logistics
 - Rental of the training venue (room with windows and natural light) with the necessary furniture and IT devices to implement the training (projector, HDMI cable, etc.).
 - Accommodation for one (1) night stay including breakfast in a four-star hotel or equivalent in Barcelona area (Spain) in which the training venue is located.
 - Meals for two (2) days (2 lunches, 1 dinner, 3 coffee breaks)
 - A report will be provided on the results achieved during this training.
- **Activity 6 (April-December 2025, potentially to be extended beyond 2025):** provide technical or methodological support to the UfM MEL analyst and Project Managers /Analysts
Expected Output Activity 6: upon MEL analyst request and in the framework of Sida-UfM programme 2022-2025, provide advice via vtc meetings and written reviews and proposals on planning, reporting, MEL plan, MEL framework tools (including data collection tools such as surveys), risk management tools and methodologies. The support will be limited to a total of 100 hours, with variable hours allocated per month depending on the UfM MEL analyst's needs. When specifically requested by the MEL analyst, support shall be provided directly to Project Managers/Analysts implementing the Sida-UfM programme.

4.2. Project management

4.2.1. Responsible body

The project will be managed by Directorate for Operations and Partnerships of the UfM.

All issues related to the technical elements in relation to this contract, mainly the specific activities as outlined in section 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.

The UfM Project Manager (MEL Analyst) will act as the unique contact point unless otherwise specified by the UfM. Upon UfM Project Manager decision, Project Managers from contributing Divisions will be also designed as complementary contact points for activities 2, 4 and 6. The UfM Project Manager will be systematically copied in any communication between the Contractor and the designed UfM Project Managers.

4.2.2. Management Structure

The Contractor is directly responsible to the Project Manager designated by the UfM.

5. LOGISTICS AND TIMING

5.1. Location

The work shall be carried out in person by the Contractor and in direct coordination with Project Team at the UfM through conversation or e-mails. Presence in Barcelona area should be ensured for



activity 3 (including one mission of one day) and activity 5 (including one mission of two days), while Activities 1, 2, 4, 6 shall be ensured through video teleconference (vtc).

5.2. Start date & Period of implementation of tasks

The intended start date is April 2025 and the period of implementation of the contract will be of 9 months from the starting date till 31 December 2025, subject to extension beyond 2025 but in any case, will not exceed December 2026.

The scope of the programme can be extended, including additional trainings, additional support to MEL Analyst and Project Managers/Analyst, subject to extension of Sida-UfM Programme 2022-2025.

6. REQUIREMENTS

6.1. Personnel

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 able to provide input 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 on any potential interference or conflict of interest of the proposed expert in his/her function as expert and his/her present or previous functions working as civil servant. Moreover proof should be submitted that the expert is seconded or on personal leave.

The selection procedures used by the contractor to select the experts who provide input to the contract must be transparent, must guarantee the absence of professional conflicting interests and the absence of any discrimination based on former or current nationality, gender, place of residence, or any other ground. The findings of the selection panel must be recorded.

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

6.1.1. Experts

Minimum requirements for experts are not defined.

6.1.2. Support facilities & backstopping

The costs for support facilities, including backstopping, are included in the tenderer's financial offer.

6.2. Office accommodation

Office accommodation for each expert providing input to the contract is to be provided by the contractor.

6.3. Facilities to be provided by the contractor

The contractor shall 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.

6.4. 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 which is to be acquired by the partner country must be purchased by means of a separate supply tender procedure.

7. REPORTS

7.1. Reporting requirements

The Contractor will provide an Inception report, 2 Interim reports on how the service is progressing and a Final report. The reports shall be submitted by the deadlines specified in the table below. These reports will be brief assessments of the progress per activity, including results obtained, and will include feedback from the users if relevant.

To summarise the contractor shall provide the following reports:

Output	Content	Payment Timeline
Inception report	Description of the services delivered under activity 1 and results achieved	Inception report to be produced after two weeks from the start of implementation
1 st Interim report	Description of the services delivered under activities 2, 3, 4, 5 and 6* and results achieved	Report to be submitted by 3 August 2025
2 nd interim report	Description of the services delivered under activity 6 including results achieved.	Report to be submitted by 15 November 2025
Final report	Description of the services delivered under activity 6* and results achieved	Report to be submitted by 15 December 2025
*Activity 6 will be implemented and delivered during the entire period of implementation of the consultancy (April-December 2025) and beyond subject to extension of Sida-UfM Programme 2022-2025.		

7.2. Submission and approval of reports

The reports referred to above must be submitted to the Project Manager identified in the contract. The Project Manager is responsible for approving the reports and will aim to approve the reports within a period of maximum 10 working days.