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1. BACKGROUND INFORMATION

1.1. Beneficiary country

Countries in which the European Commission is working in the education sector will directly benefit from the project. Specific countries to benefit from the project will be selected during the inception phase. Through the enhancement of guidance and technical support in this area, the project will also provide wider benefit for other countries in which the Commission is also managing education support programmes.

1.2. Contracting Authority

European Community, represented by the European Commission on behalf of and for the account of the beneficiary country/countries (centralised tender procedures).

1.3. Relevant country background

A key focus of the project will be to enhance education sector support in 'fragile situations'. Currently, the European Commission applies its 'crisis procedures' in 32 countries and is an active player in the education sector in at least 10 fragile countries. The project will reinforce and enhance the European Commission's education support in 'fragile situations' in line with the Council Conclusions of 19th November 2007: "An EU response to situations of fragility"¹ and "Security and Development".²

1.4. Current state of affairs in the relevant sector

When working in fragile situations affected by conflict or natural disasters, development partners such as the European Commission are faced with immense challenges to ensure the effectiveness of aid. As indicated during the recent MDG Summit in September 2010, fragile countries are furthest away from achieving the MDGs and account for three quarters of the total MDG deficit. Recent reports indicate that there are '75 million out of school children in the world, and more than half of them, 40 million, live in fragile and conflict affected states'.³ In such situations, state legitimacy and accountability is weak undermining the fulfilment of core functions. Families end up paying heavily as a result of not having access to public education. In general, ODA to education in 'transition'⁴ situations has been gradually increasing in recognition of the fact that education is a key economic and political investment for post conflict / post crisis governments, helping to restore the relationship between citizens and the state.⁵ As indicated by the concept note for the 2011 Global Monitoring

¹ Doc. 15118/07 of 20 November 2007. See also the Commission Communication 'Towards an EU response to situations of fragility' COM (2007) 643 final, of 25.10.2007, and the Resolution by the European Parliament No. De P6_TA-PROV (2007)0540 of 15 November 2007.

² Doc 15097/07 of 20 November 2007. See also the European Parliament resolution P6_TA-PROV (2008) 0639 of 18 December 2008.

³ Save the Children (2009) - *Last in Line, Last in School*

⁴ 'Transitions' denote countries that are 'transitioning' out of conflict towards sustainable development. It also denotes a move towards greater national ownership and an increase in the capacity of the state to provide for the needs of its citizens. *OECD / DAC Framing paper on transition financing mechanisms and procedures*.

⁵ Brannelly, Ndaruhitse, Rigaud (2008) *'Donor's engagement – supporting education in fragile and conflict affected states*. Council for British Teachers Education Trust (CfBT/UNESCO IIEP).

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Report for Education for All: *'as a widespread and visible social institution, schools have the potential to provide children and young people with protection, a safe space and hope for the future'*.⁶ In addition, building back better education systems in countries emerging from conflict or natural disaster can play a critical role in underpinning reconstruction efforts, as well as contributing to peace, reconciliation and social cohesion.

Recent research carried out by the *Inter Agency Network on Education in Emergencies* further elaborates on the 'multiple faces' of education in fragile situations.⁷ Education can help contribute to the integration of individuals and communities post crisis, can help prevent conflicts, and can also contribute to longer term state building and peace building efforts. Conversely, education can also perpetuate or entrench dynamics of fragility depending on the nature of its design and implementation. Where education reinforces tensions between groups divided by religion or ethnicity, or where there is unequal regional access to education for the poorest groups, it can play a significant role in reinforcing instability. Education is a complex and challenging sector in fragile situations, demanding deep analysis and contextual understanding, as well as the need to engage and support a wide range of different stakeholders, from the individual teacher and school management committee, the teachers' unions, to the central Ministry of Education. Fragile situations present new demands and pressures on the capacity and competencies of staff working in development to ensure the effectiveness of education aid programmes.

Overall, development partners have committed to *take context as the starting point* when working in fragile states and situations.⁸ More broadly, it is increasingly accepted that there is need to pay more attention to 'politics' and to the 'incentives for change'. Through deeper understanding of the context and actors involved, it is intended that development cooperation (encompassing financing, technical cooperation and policy dialogue) will be more realistic and will meet its expected objectives.⁹ For education, the gap between the provision of adequate funds and other technical inputs on the one side and the expected results for the beneficiary population on the other side has been referred to recently by practitioners as the 'missing middle' of service delivery.¹⁰ In recent years, various efforts have been made to better understand this 'missing middle', as well as how 'politics' affects country and sector operations through the elaboration of several methodological tools and analytical frameworks. The European Commission (DG EuropeAid) has developed an analytical tool relevant for sector operations: *Governance Analytical Framework*.¹¹ For the education sector, there is need to explore the relevance and potential uptake of such tools, and to develop skills and an increased sensitivity to their usefulness, particularly for those staff working in fragile situations.

Fragile situations are often characterised by poor governance with weak links between national or central government and decentralised levels (local authorities and communities) and therefore, the

⁶ <http://www.unesco.org/en/efareport/reports/2011-conflict/pre-launch/>

⁷ *The multiple faces of education in conflict-affected and fragile contexts*, April 2010, Inter-Agency Network for Education in Emergencies (INEE) Working Group on Education and Fragility

⁸ *Principles for Good international engagement in fragile states and situations*. April 2007.
<http://www.oecd.org/dataoecd/28/5/43463433.pdf>

⁹ *Making development assistance more effective by using political economy analysis: what has been done and what have we learned?* Alex Duncan and Gareth Williams, 2010, The Policy Practice

¹⁰ The 'missing middle' of service delivery has been defined as *'the process of managing front-line providers, ensuring the actual delivery of services, the human resource management and strengthening accountability for service provision'*: See ODI / Mokoro 2010, *SBS in practice*

¹¹ See EuropeAid's Reference Document No.4 'Assessing and addressing Governance in Sector Operations' (2008).

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application of such tools would appear to be highly pertinent. In 2009, the European Commission in collaboration with INEE working group for 'education and fragility' financed an initial pilot study (including 8 country case studies) to examine 'governance challenges' facing education in different fragile situations (Service Contract 2008/172-536).¹² In all the country studies, the education sector was found to adapt through a diversification of service providers, clients and learners, and as well as adaptations to organisational, management and financing arrangements. Fiscal transfers, regulation and incentives were consequently affected, and accountability between policy makers, providers and citizens broke down. Education services often became fragmented, causing communities to either provide these services themselves or causing them to disengage from involvement in the provision of education. What services there were, were largely based on local capacity where it existed, and with little prospect for increased state provision.

This initial study of education in fragile situations found that in some cases, adaptations in the system also contributed to the 'resilience' and 'early recovery' of the education sector. However, they also had the potential to become hindering factors in later stages of development, unless public sector governance related actions were addressed at an early stage. An important conclusion of the study was that renewed emphasis could be placed on adapting and applying tools which would allow development partners to better understand the political and economic context, the key stakeholders, their incentives and inter-relations. The overall intention would be to further strengthen and make more relevant the design and implementation of external support, but also have impact on domestic support to the education sector in fragile situations.¹³ This project builds on some of the initial findings of the 2009 study, but intends to be more 'demand driven' and focused on the operational realities, challenges, and choices that colleagues are faced with when working in fragile situations.

1.5. Related programmes and other donor activities:

The EU policy framework for this intervention is provided for by the Communications: '*Governance and Development (2003)*' and '*EU response to working in fragile and conflict affected situations*' (2007).¹⁴ An action plan in response to the latter Communication was in draft in which the European Commission proposes to better support Delegations working in the education sector in fragile situations. This project will also contribute to the work plan of the 'inter-services working group' on transitions / LLRD¹⁵ which is tasked with identifying practical steps for improving the EC's response in fragile and conflict affected situations. An initial study was launched by the *Transitions* inter-services working group including the preparation of a reference document and 'toolbox' of EC procedures. More broadly, the European Commission is involved in ongoing work to better analyse and address 'politics' and 'governance issues' in its country and sector operations. A key aspect of this work is to integrate 'political economy analysis' or 'governance analysis' into the more general programming guidance for the next programming exercise (starting in 2012). Being education sector specific, this project will therefore need to align, complement and contribute to these broader work streams within the Commission.

¹² http://www.ineesite.org/index.php/post/governance_of_education/

¹³ Political economy analysis is understood as: '*the interaction of political and economic processes in a society; the distribution of power and wealth between different groups and individuals, and the processes that create sustain and transform these relationships over time*' How to note on political economy' DFID Practice paper January 2009

¹⁴ See also Council Conclusions of 19th November 2007: "An EU response to situations of fragility"¹⁴ and "Security and Development".¹⁴

¹⁵ LLRD: Linking relief, rehabilitation and development

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This project will strengthen the EC's engagement in global and country level networks / fora which address education in fragile situations. At global level, the European Commission is a member of the 'Inter Agency Network on Education in Emergencies' which has prepared several guidance notes, tools and research, important work which this project should draw on and work towards putting into practice at country level. In particular, the project has strong synergies with the INEE working group on 'education and fragility' which has generated lessons and experiences from piloting fragility / conflict analysis tools in several countries.¹⁶ In addition to support to education through the geographic programmes, under the thematic programme 'Investing in People', the European Commission is supporting education in fragile states through a contribution to the 'EFA / Fast Track Initiative' and through support to the UNICEF Global programme for 'Education in emergencies and post conflict transitions'. Both of these global programmes make significant financing allocations to countries affected by fragility and conflict. There is a need to develop the capacities of the EU Delegations and related 'education sector groups' to ensure better understand the synergies between global and geographically focused financing.

In addition to the above sector specific networks, the OECD 'International Network on Conflict and fragility' (INCAF) is a key fora for development partners seeking to improve the effectiveness of their aid in fragile situations. The INCAF has prepared useful guidance on 'transition financing'. The coordination, coherence and sequencing of external interventions in any sector in fragile situations are key challenges for global policy makers, since instruments to support humanitarian, stabilisation and development objectives will often used in parallel. The INCAF has recently finalised a reference document on 'state building' in fragile situations, which would be an important resource to draw upon in finalising the methods and approaches to adopt in the project.¹⁷ More broadly, the various efforts of other major development partners (WB, UNDP, DfID, Norway, SIDA, Nederland's Government etc.) on 'political economy analysis' and its adaptation to humanitarian contexts and fragile situations will be of critical importance for this project. Experiences, promising practices and lessons learnt will need to be well understood and reflected in the organisation and methodology applied in the project.

2. OBJECTIVE, PURPOSE & EXPECTED RESULTS

2.1. Overall objective

The overall objective of the project of which this contract will be a part is as follows:

Enhance the effectiveness of EC education aid, particularly in fragile situations.

2.2. Purpose

The purpose of this contract is as follows:

To adapt, apply and share practical experiences of political economy analysis in the education sector, particularly in fragile situations.

¹⁶ INEE Draft: *Understanding education's role in fragility; synthesis of four situational analyses of education and fragility: Afghanistan, Bosnia-Herzegovina, Cambodia, Liberia*: (2010) Centre for international education and research. University of Birmingham

¹⁷ OECD DCD/DAC *International support to state-building in situations of fragility*, (2010)37. Sept 10 2010.

2.3. Results to be achieved by the Consultant

- (1) Increased availability of expertise and guidance on the application of 'political economy analysis' (and related tools, including conflict analysis) in the education sector, including relevant key developments, promising practices, methods and analytical techniques.
- (2) Strengthened awareness and capacity of country level staff involved in the management of education programmes in fragile situations of the application of political economy analysis (including conflict analysis).
- (3) Deeper understanding and practical experience within the European Commission of the main opportunities, challenges, and constraints associated with conducting political economy analysis in the education sector, to be reflected and addressed in future programming exercises.

3. ASSUMPTIONS & RISKS

3.1. Assumptions underlying the project intervention

The core assumption of the project is that development assistance will be made more effective by adopting 'political economy analysis' and related tools, including where appropriate 'conflict analysis', during the implementation of programmes. Recently, efforts have been made to document examples where use of political economy analysis has led to more effective development operations.¹⁸ However, this is very much an emerging area of practice, in which development partners are still learning, exploring and testing different approaches and techniques. This project aims to contribute to this process of learning by adapting, applying and sharing experiences of relevance to education sector operations.

This project intends to be 'demand-driven', responding to the needs identified and confirmed by EU Delegations, in consultation with country level education sector groups. An important assumption is that key international and national stakeholders working in the education sector at country level will participate and collaborate in the project. EU Delegation staff would be involved in defining and implementing country level work supported under the project. An important assumption is that there is sufficient capacity to participate, including where necessary, overseeing analytical work at country level. A related assumption is that relevant national or regional expertise, can be identified if required, to participate in any proposed technical and analytical work. Finally, this is an evolving area of work within the European Commission (EuropeAid). It should therefore be assumed that the project could be adapted in line with these broader developments on guidance 'in house'.

Another core assumption relates to the definition of 'fragile situations' which in the past was a somewhat contested issue amongst development partners. The project will adopt the operational definition of fragility applied by the OECD DAC, which highlights 'the capacity, willingness and legitimacy to perform government functions'.¹⁹ It is however also noted that the EU Communication (2007) takes a broad view about where fragility may occur, including at sub-national / regional levels within a specific country: *"in many low and middle income countries with structurally weak economies, which are unstable and vulnerable to crises, external shocks, epidemics, drug*

¹⁸ The Policy Practice, *Making development assistance more effective by using political economy analysis: what has been done and what have we learned?*, June 2010

¹⁹ See: OECD/DAC INCAF, *'Support to State-building in Situations of Fragility and Conflict'*, September 10 2010

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trafficking, natural disasters and environmental degradation, as well as endangered cultural assets and diversity. It can also be a side effect of either globalisation in marginalised areas of the world economy, or over dependence on the import of conventional energy sources, which can hamper stabilisation and development. Climate change is expected to exacerbate fragile situations by introducing new and multiple impacts in low capacity contexts. Further work on these links will contribute to develop innovative responses or to adapt existing approaches."

3.2. Risks

By their very nature, fragile situations are prone to political instability or other types of instability, with potential for conflict or other related dangers. Such fragility has the potential to cause delays to the project; however, this risk can be mitigated if any country level work is carefully planned in liaison with European Commission or other agency contacts in country as appropriate. There are risks associated with conducting potentially politically sensitive analysis at country level which will need to be identified and managed with the EU Delegation. Critical issues will be firstly establishing whether it is possible to conduct 'joint analysis' involving other development partners, and secondly, defining how national stakeholders – state and non state – will be involved in the analysis.

There is a risk that circumstances will prevent the European Commission and other national and development partners at country level from following through on the findings and implications of analysis, therefore limiting the potential impact on improved aid effectiveness. This project aims to strengthen the application and experience of available tools and approaches for 'political economy analysis' in the education sector. However, it is also recognised that this is an emerging area of practice and it will be important to 'manage expectations' about the potential consequences of analysis. Experiences so far do indicate that there is potential benefit, but so far these are not well documented and are often highly context specific. Developing a good understanding of the constraints and limitations through the project is viewed as a critical part of the process.

4. SCOPE OF THE WORK

4.1. General

4.1.1. Project description

This project will adapt and explore the application of political economy analysis (and related tools including conflict analysis) in the implementation of education sector support programmes, particularly in fragile situations. This will be achieved through implementation of a 'technical assistance component' which will mobilize relevant expertise to promote and support analysis and other related promotion activities at country level. The project will aim to support better conceptual understanding and skills development related to specific analytical and diagnostic tools and methodologies. The project will also aim to directly support specific analytical work, to generate practical experiences and lessons, to be fed back to The Commission and other relevant partners through the organization of a learning event / seminar. A final report of the project, including a short 5 page guidance document will be prepared to draw together these lessons, highlighting some of the 'key questions' and the 'value added' of political economy analysis for development and national partners working to support education.

As mentioned in Section 1.4, this project follows an earlier study commissioned by the European Commission in 2009 which attempted to pilot the use of fragility / sector governance analysis tools

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in 8 countries.²⁰ Commission internal recommendations following that initial study identified the need to better engage with national processes; to ensure a stronger link between the findings and results of the analysis and subsequent decision making of government and development partners working in the specific country. The study identified the need to better expose and develop the skills of staff in the application of the different methodologies, analytical frameworks, techniques and tools available. Other recommendations were the importance of conducting analytical work over a longer period of time and the utility of engaging regional and national expertise where possible, as well as international expertise, in carrying out analytical work. This project will attempt to implement some of the recommendations of this earlier pilot study, to provide quality and relevant expertise at country level. For The Commission, the project will promote further thinking 'in-house' in considering some of the promising practices and lessons learnt, concluding with the elaboration of guidance for the education sector.

In addition to promoting more rigorous 'context' and 'stakeholder' analysis at the design phase of sector programme, the project would be able to provide support to one particular aspect of policy or operational challenge affecting the education sector. For example, with the return to a more stable situation, a major task for the Ministry of Education is ensuring timely and accurate remuneration and management systems for teachers. Teachers' salaries normally represent between 80-95% of the education budget, and in some fragile situations, teachers can number up to 50% of all government civil servants. Addressing governance and public sector management issues related to payroll administration for teachers has the potential to secure important dividends for governments emerging from crisis. Ensuring early support to revitalize and strengthen education management information systems (EMIS) is critical, to ensure systems and data are in place to inform decision making for planning and budgeting. However, data systems often break down, and data can become corrupted. Securing good enough quality data is a challenging issue and difficult to incentivise. With the collapse of state financed and managed education, there is often an increase and diversification in non-state / private actors engaged in the provision of education services. Ensuring the necessary policy and managerial actions which could facilitate regulation and enforcement of 'national standards' by the Government is often a major challenge to be addressed by Government. Key issues will therefore tailoring the project to respond to concrete challenges and problems identified and ensuring operational relevance for colleagues working at the country level.²¹

4.1.2. Geographical area to be covered

Maximum 5 countries will benefit from the project, to be defined during the inception phase in agreement with the Commission. Technical support at country level will be tailored to the specific setting and will therefore vary. Ideally; countries will be located in different developing regions.

4.1.3. Target groups

Specific target groups to benefit from the project will be identified during the inception phase. The target group are 'education sector groups' at country level, including national partners and the staff of development partners working in the education sector. EU Delegation staff involved in the management of EU funded education programmes will benefit, as well as playing an important role as 'focal points' for country level work.

²⁰ European Commission (2009) '*Governance challenges in the education sector in fragile states*', (Author: Mike Radcliffe, HTSPE)

²¹ Most EU Delegations are in the middle of the 'implementation phase' of the EU programming cycle (2007-13).

4.2. Specific activities

The specific activities of the project are as follows:

1. Provision of technical assistance

The technical assistance component of the project will be implemented by the contractor at country level and will provide relevant expertise and technical inputs of a high quality to promote and develop skills amongst beneficiaries. The contractor will provide technical support to ensure the quality of the country level work during the design phase, including the drafting of any 'terms of reference' for the expertise required (inception phase). International, regional and national expertise could be mobilized to support country level work, where relevant and agreed with the Commission. A 'work plan' for the TA component will be included in the inception report and will be agreed with The Commission at the end of the inception phase. If deemed relevant, the project could also promote the mobilisation of additional and complementary expertise, to be financed and managed outside of this contract at country level, using geographical programme funds.

2. Organisation of a 'good practice' seminar /learning event

One seminar will be organized by the contractor in close coordination with The Commission, for Commission staff working in the education sector (at Headquarters and Delegation level), as well as other interested partners. The seminar will present the results of the country level work carried out, present selected key tools and methodologies for political economy and conflict analysis, highlighting the relevance and application of these tools for the education sector. The Seminar will provide develop knowledge and skills of the participants, share experiences and promising practices, and allow consultation with relevant stakeholders on the outline of the proposed guidance note.

3. Preparation of final report and guidance document

A final report summarising the activities and main achievements of the project including 'lessons learnt' will be produced. A short 5 page guidance document for staff will be prepared summarising key developments, issues, challenges related to the application and experiences of political economy analysis and related tools (including conflict analysis) in the education sector. This will include a list of key questions that could be used in the education sector to assess the context, the mapping of actors, and the different power relationships and incentives amongst actors.

In order to disseminate the project widely with other practitioners, the project will be documented through the EuropeAid [Capacity4Development](http://www.capacity4dev.eu) (www.capacity4dev.eu) web platform. Key project activities, updates and developments (including video and audio material where possible) will be posted via a specific online working group set up for the purpose, with the support of the [Capacity4Development](http://www.capacity4dev.eu) editorial team.

The contractor will implement the project in three phases. The project combines desk work and missions to country level:

1. Inception phase of 2 months during which the workplan for the project will be developed. A desk study will be conducted to outline key developments, methodological tools and analytical frameworks available for use during the project. Project information (objectives, methods, proposed activities) will be provided in a 'project summary', which will be used to promote the project on EuropeAid's [Capacity4Development](http://www.capacity4dev.eu) web platform and at country level. The project intends to be 'demand led'. EU Delegations will be informed and invited to participate in the project, together with their

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'education sector groups', where this is possible. The selection of countries to benefit from technical support under the project will take place during the inception phase and will be agreed with the Commission. Considering the project timeframe and resources available, it is suggested to limit the number of countries to be supported; however, this will be negotiated with The Commission during the inception phase on the basis of country level needs.

During the inception phase, technical assistance inputs to be provided to the country level will be agreed. This will include defining the key questions and problems to be addressed, outlining the scope of analytical work required (e.g. fieldwork), and defining the timing type and amount of expertise required. Initial planning will take place during the inception phase to prepare also the learning event / seminar and the short guidance document - to be completed in final phase of the project. The inception phase will involve at least one 'face to face' meeting in Brussels between the task manager, the Advisory Group and the contractor, supplemented by regular telephone and email communications, as and when required. An inception report will be submitted summarising the methods and tools which will be used in the project. The report should outline the main activities and achievements in the inception phase, including a workplan for the technical assistance at country level and the learning event / seminar to be developed in the final phase.

2. Implementation phase of 6 months during which country level work will take place with technical support inputs provided through the project. This period will involve multiple missions to country level of different experts contracted through the technical assistance component. The implementation phase of the project will also involve at least one face to face meeting in Brussels between the Task manager, the Advisory group and the contractor to update on progress with the country level work, as well as regular communication to ensure adequate logistics and coordination support at country level.

3. Final phase of 3 months during which the experiences and lessons learnt which have evolved out of the different country level analyses will be gathered and presented in the form of a Seminar. The seminar will take place in Brussels and will be organised by the contractor in close coordination with the Commission task manager and advisory group. EC staff at Headquarters and in EU Delegations, as well as other interested partners, will be invited to participate and will be consulted on the key findings of the project to date. The project will cover the costs of facilitation, facilities, speakers and related logistics for the seminar. The logistical costs of EC participants will not be covered by the project. A final report (maximum will be produced following the seminar, summarising the main conclusions of the project, lessons learnt from country level work and highlighting key issues for future programming in the education sector. A short 5 page 'guidance note' will be produced for The Commission to further disseminate best practice and key developments for staff working on education programmes at country level.

The following timetable is proposed. Specific dates / timeframe for deliverable and meetings could be adapted during the inception phase with the agreement of The Commission.

Activity	Date	Location
Inception phase. Conduct desk study including literature review outlining key developments in the field, methodological tools and approaches to be used in the project. Prepare 'project summary'.	10 th January 2011	Home base
Meeting with EC Advisory group to review project planning, present findings of 'desk study' - outlining of methods and tools, review draft 'project brief' and agree next steps.	25 th January 2011	Brussels

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Uploading 'project brief' to 'Capacity4Development'. Promotion of the project with relevant EU Delegations.	1 st February 2011	Home
Preparation of 'workplan': selection of countries, draft TORs with EU Delegations, adjustments to methodology if required, identification of technical expertise.	February 2011	Brussels
Submission of inception report (10 pages) – approval of inception report by the Commission concludes inception phase.	28 th February 2011	Home
Implementation phase: Country level analytical work implemented with support from the technical assistance component.	March – August 2011	Countries to be determined in Inception phase
Briefing meeting with EC Advisory group to update on implementation phase and prepare for the concluding phase including the preparation of seminar and guidance document.	15 th June 2011	Brussels
Final phase: Preparation of seminar (2 days), final report (15 pages) and guidance document (5 pages).	September - November 2011	Home
Organisation of 2 day seminar in Brussels, including presentation of country level work.	15 th - 16th Oct 2011	Brussels
Debriefing meeting with the EC advisory group. Submission and presentation of draft final report.	1 st November 2011	Brussels
Submission of final report. Project concludes with the approval by The Commission of the final report and guidance document.	20 th November 2011	Brussels

4.3. Project management

4.3.1. Responsible body

The project will be assigned a 'task manager' within the DG- EuropeAid, European Commission (Social and Human Development Unit).

4.3.2. Management structure

The contractor will provide a 'project manager' (part-time) who will ensure the quality of all activities, inputs and documents supported and produced through the project, including reports, terms of reference and other related documents. The project manager will be responsible for the design and preparation of the technical assistance component, the subsequent contracting of experts, the preparation of all reports, including the 5 page guidance note and organisation of the learning event / seminar to be organised in the final phase of the project.

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The Commission will provide a 'task manager', who will be responsible for the management of the project within the Commission. The 'task manager' will be the focal point for the project within the Commission, and will ensure good coordination and communication between the project and the relevant EU Delegations. The project will also have a small 'advisory group' comprised of European Commission (DG EuropeAid) staff. The advisory group will provide technical and advisory support for the implementation of the project and ensure coordination of the project with other related Commission activities in this field. Commission colleagues participating in the advisory group will have expertise in EC operations in support of education, governance and post-conflict reconstruction objectives.

4.3.3. Facilities to be provided by the Contracting Authority and/or other parties

The Contracting Authority will not be required to provide any facilities during the study.

5. LOGISTICS AND TIMING

5.1. Location

The project will be implemented from the 'home base' of the contractor. There will be at least three 'face to face' briefing / debriefing meetings during the assignment in Brussels with the EuropeAid Advisory Group and task manager, not requiring an overnight stay.

In addition, there will be missions to developing countries (including fragile situations) financed under the project's technical assistance component and to be identified during the inception phase. The offer will be based on ensuring several missions over the 6 month period of implementation to a maximum of 5 countries. The number of countries to be supported through the project will be defined in the inception and will depend on the feasibility of support activities demanded by EU Delegations, in coordination where possible with education sector groups.

It is envisaged that each mission could include 1 or 2 experts (covering the fields of education / political economy or governance / conflict expertise). Missions may include field work and travel outside of the capital city; however, it is also envisaged that regional and national experts could be recruited by the EU Delegation to support implementation of field work.

5.2. Commencement date & Period of execution

The intended date for starting the project is January 10th 2011. The period of execution of the project will be 11 months. Please refer to Articles 4 and 5 of the Special Conditions for the actual commencement date and period of execution.

6. REQUIREMENTS

6.1. Personnel

All experts who have a crucial role in implementing the contract are referred to as 'key experts'. A multi-national team with complementary skills is desirable. The profiles of the key experts for this contract are as follows:

Key expert 1: Project manager

Requirements

- Education at least up to Masters Degree / Academic level or equivalent professional experience

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- A minimum of 10 years relevant professional experience, including proven experience as a project manager.
- Strong knowledge and demonstrated understanding of broader debate around political economy analysis, fragility and related issues in the education sector

Desired

- Strong research / academic background, with demonstrated skills in performing desk reviews, including the application of 'political economy analysis', 'conflict analysis' and related analytical frameworks;
- Experience in institutional and organisational analysis in the education sector, including links to governance reforms at macro and community level;
- Significant expertise / experience in education sector policy analysis and planning, with experience of working in fragile situations;
- Experience in aid delivery / programmes for support in fragile states, including sector wide approaches;

Key expert 2: Education governance experts

Experts to be recruited through the technical assistance component – CVs of at least 2 available experts should be presented in the tender.

Requirements

- Education at least up to Masters Degree / Academic level or equivalent professional experience
- A minimum of 10 years relevant professional experience in the design and management of 'action research' in developing countries in the education sector.
- Strong knowledge of broader debates as well as experience in applying political economy analysis and related tools (including conflict analysis) in developing countries.
- Expertise in broad range of governance issues and programming, with experience in developing countries or fragile situations
- Expertise in education sector policy analysis and planning, with experience of working in developing countries or fragile situations;

Desired

- Experience of decentralisation policy and implementation, and other public sector reform (including public finance management);
- Policy and planning experience for community based initiatives;
- Strong knowledge and demonstrated understanding of broader debate around political economy analysis and fragility;
- Strong research / academic background, with demonstrated skills in performing desk reviews and managing surveys;
- The expert should be able to work in a range of different languages including French and Spanish.

Terms of reference

6.1.1. Other experts

CVs for experts other than the key experts are not examined prior to the signature of the contract. They need not be included in the tender, and will be made available for review by the European Commission during the inception phase.

The Consultant shall select and hire other experts as required according to the profiles identified during the inception phase in the work plan and specific 'terms of reference' for the technical assistance component. All experts must be independent and free from any conflicts of interest in the responsibilities accorded to them.

The selection procedures used by the Consultant to select these other experts shall be transparent, and shall be based on pre-defined criteria, including professional qualifications, language skills and work experience. The findings of the selection panel shall be recorded. The selection of experts shall be subject to approval by The Commission, as the Contracting Authority, in consultation with the EU Delegation in the specified country.

Note that civil servants and other staff of the public administration of the beneficiary country cannot be recruited as experts, unless prior written approval has been obtained from the European Commission.

6.1.2. Support staff & backstopping

It is expected that the contractor will provide the necessary support staff and backstopping to the key experts. It is anticipated that the experts will also be assisted during each mission by the EU Delegation and other local support staff who will facilitate work at the country level, for example arranging meetings with local institutions and partners, local travel arrangements, and translation where needed. This support will be delivered over a period of 6 months during which country level work will take place.

6.2. Office accommodation

It is anticipated that the assignment will be conducted from home base or on field missions in selected countries. EU Delegations at country level will provide advice and support to the contractor and to specific experts to ensure the proper coordination and implementation of work at country level. If additional office accommodation is needed at country level, it will be provided by the contractor.

6.3. Facilities to be provided by the Consultant

The Contractor shall ensure that experts are adequately supported and equipped. In particular, it shall ensure that there is a sufficient administrative, secretarial and interpreting service provided to enable experts to concentrate on their primary responsibilities. It must also transfer funds as necessary to support activities under the contract and to ensure that its employees are paid regularly and in a timely fashion.

Such support should include supplies, services, documentation, logistical support, internet access, insurance and other such facilities necessary to carry out the study.

If the Contractor is a consortium, the arrangements should allow for the maximum flexibility in project implementation. Arrangements offering each consortium member a fixed percentage of the work to be undertaken under the contract should be avoided.

6.4. Equipment

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

6.5. Incidental expenditure

Not applicable for a global price contract.

6.6. Expenditure verification

Not applicable for a global price contract.

7. REPORTS

7.1. Reporting requirements

- **Inception Report** of maximum 10 (main text, excluding annexes) pages to be produced two months after the commencement of the implementation. In the report, the consultant shall describe the main findings of the desk study, outline key developments, proposed methodology and tools which will be employed for the education sector. Detailed work plan for the implementation of the project will be presented, including outline of all activities which will take place at country level, the expert mobilisation for the technical assistance component. This report should also include details of any encountered and/or foreseen difficulties.
- **Draft final report** of maximum 15 pages (main text, excluding annexes). The structure and content of the report will be agreed with the Commission during implementation of the project. This report shall be submitted no later than one month before the end of the period of implementation of project activities.
- **Final report** with the same specifications as the draft final report, incorporating any comments received from the concerned parties on the draft report. The final report shall include an executive summary and be provided by the latest 10 days after the reception of the comments on the draft final report. The 'guidance note' of maximum 5 pages will be included as an Annex to the final report and as a separate document. The final report must be provided along with the corresponding invoice.

7.2. Submission & approval of progress reports

The Commission's task manager is responsible for providing comments and providing final approval to reports, to be completed with advice and support of the EuropeAid advisory group.

One word and one PDF copy of the reports referred to above must be submitted to the Task Manager identified in the Commission. All reports must be written in English and must be submitted ready for publication and in accordance with Commission publication standards.

The final report and the guidance note should be translated also into French by the contractor for publication by the Commission.

8. MONITORING AND EVALUATION

8.1. Definition of indicators

Inception and final reports delivered on time, and to the satisfaction of task manager in EuropeAid and for the members of the Advisory group.

Briefing / debriefing meetings function effectively to ensure proper management, oversight and progress of the project.

Country level activities are identified, planned and implemented to the satisfaction of the Commission (DG EuropeAid and the EU Delegation involved).

Regular communication occurs between the contractor and the task manager to ensure the proper planning of activities.

Provision of guidance / briefing notes (agreed under inception phase of study) that are practical and useful for EC and other agency staff at head quarters and country level.

8.2. Special requirements

No special requirements.