[Evaluation title]

**TERMS OF REFERENCE – PART A**

**Reference EVA-2020-[Five digits number provided by OPSYS]**

< Please insert the information requested between the <> brackets, as appropriate please remember to delete this paragraph, any other text with yellow highlighting, and to suppress all brackets.

The specific terms of reference include two parts:

* Part A – You should draft this part using this MS Word document, and then convert the document into PDF and upload it as an internal support document in OPSYS.
* Part B – Should be encoded directly into OPSYS. You can use the space at the end of this template to prefill the information you will be encoding.
* Annexes I and II – You should use the templates from EVA 2020 Intranet page and adapt them to your evaluation. You should not modify the allocation of points between the three main award criteria in the template of the evaluation grid. You should then convert both Annexes into PDF and upload them in OPSYS as part of the Request for Service (Annex I uploaded as “Organisation and methodology” ; Annex II uploaded as Evaluation grid) >

# BACKGROUND INFORMATION

< The objective of this chapter is to provide a concise, descriptive overview of the subject of the evaluation and its context over the relevant timeframe. It aims at providing the framework contractors with key information. The chapter shall be factual and not contain judgement on the results and the performance of the subject of the evaluation in order not to influence the independent work of the evaluators. >

# DESCRIPTION OF THE EVALUATION ASSIGNMENT

< This chapter should describe:

* Rationale and objectives of the evaluation
* Requested services
* Evaluation phases and related key activities and deliverables
* Language of the Specific Contract
* Management of the evaluation, team member presence required or not for briefing and/or debriefing >

# LOGISTICS AND TIMING

< The requirements for the logistics and timing must be included in Part B and directly encoded in OPSYS. In particular, indicate in OPSYS all specific missions in Europe or in the partner countries, including which key positions of the evaluation team must take part in them, their location, quantity, and indicative duration, e.g. “a one day inception meeting in Brussels to be attended at least by the team leader and by the quality support expert”. If you consider that some important information cannot be added to Part B, then it can be added here. >

For all [other] matters relating to logistics and timing, please refer to Part B of the Terms of Reference.

# REQUIREMENTS

< The requirements for the key experts of the evaluation team, including the possible addition of some key positions, must be included in Part B and directly encoded in OPSYS (“expertise by a team”). Additional requirements other than the key experts can also be added in OPSYS. If you consider that some important information cannot be added to Part B, then it can be added here. >

For all [other] matters relating to requirements, please refer to Part B of the Terms of Reference.

# REPORTS AND OTHER DELIVERABLES

< Title, description of content, language, and submission deadline for each report and deliverable must be included in Part B and encoded directly in OPSYS. If you consider that some important information cannot be added to Part B, then it can be added here. >

For all [other] matters relating to reports and deliverables, please refer to Part B of the Terms of Reference.

# QUALITY STANDARDS

< Describe how you will assess the performance of the contractor and the quality of the final deliverables. If a quality assessment grid already exists, then refer to it and put the grid in an Annex >

# PRACTICAL INFORMATION

Please address any request for clarification and other communication to the following address(es): < Please indicate the e-mail address of the functional mailbox used for all communication with the FWC related to the current RfS. For INTPA only: INTPA-FWC-EVA@ec.europa.eu >

[Communication on operational aspects of the evaluation will follow the channels indicated by the evaluation manager.]

# ANNEXES

< Each service using the FWC should adapt the list of Annexes to their own practice. Only Annexes I and II are compulsory uploads in OPSYS: you should draft them in separate documents (using the separate templates for those Annexes) >

**Annex I – Template for the technical offer (organisation & methodology)**

See separate Annex I attached with the Request for Service.

The list and CVs of the key experts for this evaluation must follow the template of Annex B-II-4 of the global terms of reference of the framework contract.

**Annex II – Evaluation criteria for the technical offer (evaluation grid)**

See separate Annex II attached with the Request for Service.

\* \* \*

TERMS OF REFERENCE – Part B

< The information related to Part B is encoded directly in OPSYS >

**BACKGROUND INFORMATION**

**1. Benefitting zone**

[Benefitting zone: indicate name of Country / Region – or Global]

**2. Contracting authority**

The European Union, represented by the European Commission, B-1049 Brussels, Belgium.

< *This is set by default and cannot be modified after you selected Direct Management when created the Planned Contract.>*

**3. Contract language**

Language: [EN or FR]

**LOCATION AND DURATION**

**4. Location**

< *Please note that strategic evaluations are* ***home based*** *assignments (normal place of posting). Missions of the evaluation team must be required in the ToRs under this section, or be part of the contractor’s accepted offer. Missions can include attending meetings with the contracting authority, face-to-face interviews with stakeholders, seminars, and field visits.*

*If the countries/places to be visited by the evaluators are still to be decided, inter alia as an output of the inception or desk phase, the potential countries/places will be indicated as “tentative” to allow contractors to estimate the related costs in their financial offer.>*

* Normal place(s) of posting of the specific assignment: [home based]
* Mission(s) outside the normal place of posting and duration(s): [indicate all required missions including indicative locations, durations, and quantities]

**5. Start date and period of implementation**

< *The period of implementation shall include periods foreseen for drafting, reviewing, commenting, revising, and approving all reports and deliverables, briefing/debriefing sessions, and activities for communication and dissemination (if applicable via seminars or any other required communication media)* >

The indicative start date is [indicative start date] and the period of implementation of the contract will be [duration of the assignment] days from this date (indicative end date: [indicative end date]).

**REQUIREMENTS**

**6. Expertise**

The minimum requirements covered by the team of experts as a whole are detailed below.

* Qualifications and skills required for the team:

[Qualifications and skills required]

* General professional experience of the team:

[General professional experience]

* Specific professional experience of the team:

[Specific professional experience]

* Language skills of the team: [List the language skills necessary to conduct the assignment] [You may want to add: Languages levels are defined for understanding, speaking and writing skills by the Common European Framework of Reference for Languages available at <https://europass.cedefop.europa.eu/en/resources/european-language-levels-cefr> and shall be demonstrated by certificates or by past relevant experience.]

Additional expertise requirements for the team composition:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Position** | **Expert category** | **Minimum requirements *(NB: for the position)*** | **Minimum number of  working days** | **Additional information** |
| Team Leader | Senior | [Describe your additional requirements for this particular position here] | [Number of working days] or if no minimum required [0] | [If a minimum is specified, add: The number of working days presented is the minimum required and can be increased in the offer.] It is up to the contractor to propose an appropriate number of days for this position. |
| Quality Support Expert | [Expert category: medium or senior] | [Describe your additional requirements for this particular position here] | [Number of working days] or if no minimum required [0] | [If a minimum is specified, add: The number of working days presented is the minimum required and can be increased in the offer.] It is up to the contractor to propose an appropriate number of days for this position. |
| Project Manager | [Expert category: junior, medium, or senios] | [Describe your additional requirements for this particular position here] | [Number of working days] or if no minimum required [0] | [If a minimum is specified, add: The number of working days presented is the minimum required and can be increased in the offer.] It is up to the contractor to propose an appropriate number of days for this position. |
| Other Expert | [Expert category, junior, medium, or senior] | The requirements for expert categories are described in the global terms of reference. | [Number of working days] or if no minimum required [0] | [You must always create at least 1 “Other Expert” additional requirement, that the contractors can duplicate in their offer, with the suggested following comment:]  Contractors may duplicate this line to propose any additional key expert they see fit and of any of the available categories junior/medium/senior as part of the evaluation team in their offer[, with at least [number] working days of senior expertise] [in addition to the minimum working days required for the team leader]. |
|  | Etc… |  |  |  |

**7. Other requirements**

< It can be the organisation of a seminar, of an event, some specific requirements in terms of communication that would not be reflected in the deliverables (see section 11 of Part B, below), etc. This is entirely optional. >

**8. Incidental expenditure**

No incidental expenditure provided for in this contract.

**9. Lump sums**

No lump sums provided for in this contract.

**10. Expenditure verification**

No expenditure verification report is required

**REPORTS and OTHER DELIVERABLES**

**11. Reports and other deliverables requirements**

|  |  |  |  |
| --- | --- | --- | --- |
| **Title** | **Content** | **Language** | **Submission timing or deadline** |
| [type] | [Description of content, or refer to Annex III if available/relevant] | [Language] | [submission timing or deadline] |
| [type] | [Description of content, or refer to Annex III if available/relevant] | [Language] | [submission timing or deadline] |
| [type] | [Description of content, or refer to Annex III if available/relevant] | [Language] | [submission timing or deadline] |