

SPECIFIC TERMS OF REFERENCE
Needs Assessment of Independent Media in the Neighbourhood
FWC SIEA 2018- LOT 3 : Human Rights, Democracy and Peace
EuropeAid/138778/DH/SER/multi
Request for Services n° 2019/405598/1

1. BACKGROUND

The European Union (EU) supports the partner countries in the Neighbourhood to foster stabilization and resilience. The framework of the **Revised European Neighbourhood Policy**¹ emphasizes that democracy, human rights and the rule of law as key elements of stabilization. A free, independent media is one of the pillars of democracy. It acts as a bulwark against authoritarianism and allows citizens to make informed choices. Accurate information and analysis produced by independent professional journalists are public goods that are becoming increasingly scarce in the Neighbourhood partner countries.

The Arab Spring in the Southern Neighbourhood (which began in Tunisia in 2011 before spreading to other countries) raised high hopes for democratisation and freedom of expression and of press. However, almost a decade later, the region is witnessing varied degrees of shrinking spaces and of authoritarian practices to restrict the freedom of media, as well as strong foreign influence through rich media owners with strategic allegiances and interests. The consequences for independent media professionals and journalists translate as frustration, self-censorship, economic and financial struggle, surveillance, if not imprisonment, or disappearances and deaths.

There exist a number of common challenges affecting the media landscape throughout the Eastern Partner countries. The restrictive regulatory and legal framework (relevant media laws, codes and policies) provides for an extremely difficult environment for independent and small/medium media outlets to operate, as well as limits the freedom of expression. The space for media pluralism continues to shrink. In addition, a network of pro-Kremlin media outlets has been rapidly expanding, while authorities and oligarchs tighten their grip on local advertising markets

Within this context, the European Union has been committed to support independent media both through regional and bilateral interventions, managed from Brussels and from EU Delegations in Neighbourhood countries respectively. The new Multi-annual Financial Framework (MFF) provides an opportunity to possibly revisit the existing instruments of EU support to independent media. The present assignment will provide the European Commission with an important gap analysis and needs assessment in order to inform upcoming programming of EU assistance by European Commission, DG NEAR in particular, including potential revision of the existing or devising of new approaches and instruments to effectively support independent media. Therefore, recommendations in this regards will be the most important part of the present assignment.

For the purpose of the present assignment, the working definition of “media” should include media outlets as well as individual media professionals, and organisations that support media (e.g. through research). The present assignment will focus on media with significant audience and therefore with impact. The present assignment will focus on independent media – media with mission to provide independent information to the public, and with the biggest potential to genuinely benefit from the EU support in order to generate the change and impact on significant scale.

¹ http://eeas.europa.eu/archives/docs/enp/documents/2015/151118_joint-communication_review-of-the-enp_en.pdf

2. DESCRIPTION OF THE ASSIGNMENT

➤ **Global objective**

The global objective of this assignment is to carry out a mapping of the current trends in the media sector, of the existing donor support to media development, and a gap analysis and needs assessment in Neighbourhood South and East countries, in order to provide support and formulate recommendations to the EU Delegations and Headquarters in programming new assistance in the media sector in the Neighbourhood (both South and East), notably assistance to support independent media, including in difficult (read restrictive) environments.

➤ **Specific objective(s)²**

1. To provide a thorough mapping of the current trends in the media sector in each country as well as in the regions (Neighbourhood East and South), notably
 - Legal and political context (including the quality of governmental and independent institutions meant to support independent media and quality of journalism training institutes, etc.)
 - Main trends and challenges (e.g. digital transition, shrinking space/restrictive environment, practices of censorship and self-censorship, financial sustainability, working conditions for male and female journalists and/or journalists from vulnerable groups, etc.)
 - Existing donor support to media development and lessons learnt from past EU funded actions (e.g. training of journalists, quality content development, ad-hoc emergency funding, etc.)
2. To identify gaps in the donor assistance, draw lessons learnt and to provide a needs assessment of independent media professionals and outlets - in each country and at regional level (both Neighbourhood East and South separately, as well as Neighbourhood wide) with a view of the future programming of EU assistance. Particularly, analysis of what are the areas that would have the greatest impact in terms of sustainability of independent media in the Neighbourhood.
3. To provide recommendations to the EU Delegations and NEAR Headquarters how to design effective future assistance to support independent media and how to address the needs assessed (identified under SO 2), including in difficult (read restrictive) environments. The recommendations should include both bilateral (per individual country) as well as regional approaches (both Neighbourhood East and South separately, as well as Neighbourhood wide).the recommendations should highlight what are the areas most likely to have the greatest cost-effective impact on the sustainability of independent media.

➤ **Requested services, including suggested methodology³**

A team of 4 (four) experts with proven experience in media development and/or journalism is requested. Team members will also have to demonstrate their experience in the Neighbourhood region.

The team members' requested profiles are described in detail in section 3 of these Terms of Reference.

The assignment will be structured in four phases:

1. Inception
2. Execution

² The global and specific objectives shall clarify that all EU funded actions must promote the cross-cutting objectives of the EC: environment and climate change, rights based approach, persons with disability, indigenous peoples and gender equality.

³ Contractors should describe how the action will contribute to the all cross cutting issues mentioned above and notably to the gender equality and the empowerment of women. This will include the communication action messages, materials and management structures.

3. Synthesis
4. Dissemination

The outputs of each phase are to be submitted at the end of the corresponding phases as specified below.

Phase	Key activities	Outputs and meetings
Inception	<p>Initial document/data collection, including background and stakeholder analysis;</p> <p>Methodological design of the study (assignment questions with judgement criteria, indicators and methods of data collection and analysis);</p> <p>Planning and preparation of the interviews and missions to partner countries</p> <p>Establishment of contacts with the organisations and programmes that are relevant to the assessment, as guided by the European Commission;</p> <p>Preparation of a draft table of contents for the Final report</p>	<p><i>Kick -off meeting (face-to-face meeting in Brussels) with the Contracting Authority;</i></p> <p>Preparation of a concise Inception Note outlining the methodology, the operational and methodological challenges to be addressed by the Consultant for a successful completion of the assignment (as specified in the section 2);</p> <p>Preparation of a slide presentation to be used as support for the kick-off meeting.</p> <p>Preparation of a draft structure of the report highlighting the impact/cost-effectiveness of each potentially proposed measure.</p>
Execution	<p>Study (desk review) of relevant documents/data.</p> <p>Phone/VC interviews with all relevant stakeholders;</p> <p>Field missions to partner countries among the 14 Neighbourhood countries, where the experts will schedule meetings and interviews with relevant stakeholders (EU Delegations, media professionals, donors, etc.), as necessary.</p>	<p>Drafting of the Intermediary Note describing the main findings based on the specific objectives identified in section 2 of these Terms of Reference.</p> <p>Preparation of the next steps and identification of further interviews and analysis to be done to complete the assignment.</p>
Synthesis	<p>Final analysis of findings based on the specific objectives identified in section 2 of these Terms of Reference;</p> <p>Formulation of the overall assessment, conclusions and recommendations;</p> <p>Reporting.</p>	<p>Preparation and submission of the Draft Final Report and of all the other deliverables and outputs listed in these Terms of Reference;</p> <p><i>One debriefing with the Contracting Authority.</i></p>
Dissemination	<p>Organisation of the final presentation seminar</p>	<p>Final presentation seminar during which the Final Report will be presented and discussed with the Reference Group, stakeholders and representatives from partner countries.</p> <p>Final report, executive summary</p>

		Presentation of the main findings in power point slides for the final presentation seminar
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For mapping of the current trends in the media sector (SO1) and the needs assessment (SO2), it will be key to answer the following guiding questions:

- What is the context that media operate in?
 - o What is the political as well as financial context, and the legal framework/requirements?
 - o What is the quality of the institutions/authorities meant to support media (e.g. regulators, etc.)?
 - o What is the quality of education institutions in the media sector?
 - o What are the general trends in the sector (e.g. digital transition, dissemination/publication via social networks, etc.)
 - o How do the above impact independent media? What are the challenges and opportunities?
- What are the quality and the needs of the independent media professionals and independent media outlets? What are their challenges?
 - o In terms of skills
 - o In terms of organizational management and resource management (financial as well as human resources)
- What are the prospects for sustainability of independent media (both short term and long term)? What are the main challenges?
- Donor assistance:
 - o What needs/issues are targeted by the existing donor assistance? How effective the assistance is?
 - o What are the challenges of donor assistance?
 - o Where are the gaps in donor assistance?
 - o What is the added value of multi-country/regional assistance as opposed to assistance provided in one country only?
 - o What are the advantages and disadvantages of one ENI-wide regional programme covering the whole Neighbourhood (East and South) as opposed to two regional programmes in each region (East and South) separately?

For the recommendations, it will be key to answer the following questions:

- What type of assistance/instrument should target what type of media?
- What type of assistance/instrument is suitable to meet what kind of needs?
- How to design and provide effective and meaningful assistance in difficult environments (e.g. restrictive regimes, shrinking spaces, etc.)?
- How to support vulnerable groups, in particular women, both in terms of content (projected image) as well as in participation of these groups in media industry, including in restrictive environments?
- How to best ensure sustainability of results as well as independent media professionals/outlets?
- Is there a need for new type of assistance/instruments? If yes, what and how to design it?

For each recommendation, an analysis of their potential impact, cost-effectiveness and feasibility will be presented.

➤ **Required outputs**

- Inception Note outlining the methodology, the operational and methodological challenges to be addressed by the Consultant for a successful completion of the assignment shall be submitted no later than 30 calendar days after the signature of the contract;

- Interim Note describing the main findings based on the specific objectives identified in section 2 of these Terms of Reference shall be submitted no later 15 calendar days after the return from last field mission;
- Draft final report (including all the elements of the final study) shall be submitted 45 calendar days before the final deadline of the end of the contract;
- Final report shall be submitted within 10 calendar days after receiving feedback from the Contracting Authority and will include:
 - **Executive summary** of max. 5 pages;
 - **Mapping of the trends in the media sector** in each country in the Neighbourhood as well as at regional level;
 - **Mapping of gaps in donor assistance and needs assessment** in the media sector in each country in the Neighbourhood as well as at regional levels;
 - **Operational recommendations** to the EU (EU Delegations and Headquarters)
 - *how to design an effective future assistance* in the media sector in each country in the Neighbourhood as well as the landscape and common patterns at regional level; and
 - *what kind/type of assistance* in the media sector in each country in the Neighbourhood as well as at the regional level.
- Presentation of the main findings in power point slides for the final presentation seminar.

Section 5 details more precisely the reporting requirements in terms of content.

➤ **Language of the Specific Contract**

The language of the contract and requested deliverables is English.

3. EXPERTS PROFILE or EXPERTISE REQUIRED

➤ **Number of requested experts⁴ per category and number of man-days per expert or per category**

The table below indicates the minimum number of evaluators and the minimum number of working days (overall and in the field), per category of experts to be foreseen by the Contractor. The section 4 foresees an indicative distribution of working days per expert and per assignment.

Category of experts	Minimum number of experts	Total minimum number of working days (total) per expert	(Out of which) minimum number of working days on mission per expert
Cat I	1	120	20
Cat II	3	100	15
Cat III	0	0	0

In particular, the Team Leader (to be identified in the Organisation and Methodology and in the Financial Offer) is expected to be a Cat I expert, possess a demonstrable senior technical expertise coherent with the requirements of this assignment as well as managerial experience and skills.

➤ **Profile per expert or expertise required:**

Team Leader (Category I):

- Qualifications and skills:
 - o Education at least Masters Degree Academic level in Social Sciences, Political Sciences, International relations, Journalism, Law or other relevant field. In the absence of a Masters Degree, at least 5years of equivalent professional experience. (which must be above the general professional experience duration fixed below)

⁴ The European Union pursues an equal opportunities policy. Gender balance in the proposed team, at both administrative/secretarial and decision-making levels, is highly recommended.

- Proven excellent communication, writing and leadership skills
- Proven programme or project management skills
- General professional experience
 - At least 12 (twelve) years of experience
- Specific professional experience
 - Out of the 12 (twelve) years of general experience
 - At least 8 (eight) years of cumulated experience in journalism, media development and related fields
 - At least 3 (three) years of experience with media development programmes (at least 2 (two) different media development programmes)
 - Proven experience in the Neighbourhood region is mandatory
 - At least 3 (three) years of experience as Team Leader
 - Proven experience with media development programmes in the Neighbourhood region is an asset
 - Proven experience with EU-funded media development programmes is an asset
- Language skills
 - It is mandatory to have one of the two following combination of languages:
 - 1/ Fluent in English and Arabic (working level of French would be an asset)
 - 2/ Fluent in English and Russian (knowledge of one of the Neighbourhood East local language would be an asset)

Experts 1, 2, and 3 (Category II)

- Qualifications and skills:
 - Education at least Masters Degree Academic level in Social Sciences, Political Sciences, International relations, Journalism, Law or other relevant field. In the absence of a Masters Degree, at least 5 years of equivalent professional experience. (which must be above the general professional experience duration fixed below)
 - Proven excellent communication and writing skills
- General professional experience
 - At least 6 (six) years of experience
- Specific professional experience
 - Out of the 6 (six) years of general experience
 - At least 4 (four) years of experience of cumulated experience in journalism, media development and related fields
 - Proven experience with media development programmes (experience with programmes in the Neighbourhood region would be an asset)
 - Proven experience as a journalist is an asset
 - Proven experience in the Neighbourhood region is mandatory and an asset (see further specifications of mandatory requirements for the team as a whole)
- Language skills
 - It is mandatory to have one of the two following combination of languages:
 - 1/ Fluent in English and Arabic (working level of French would be an asset)
 - 2/ Fluent in English and Russian

The team of experts must have the following language skills and field experience:

The team of 4 (four) experts should cover the necessary combination of language skills and geographical field experience as follows:

- 2 (two) experts with fluency in English and Arabic (working level of French would be an asset)
- 2 (two) experts with fluency in English and Russian (knowledge of one of the Neighbourhood East local language would be an asset)
- 1 (one) expert with proven experience in the Neighbourhood South region
- 1 (one) expert with proven experience in the Neighbourhood East region

The exact arrangement and distribution among experts shall be determined by the contractor in the offer

In addition, the team of experts must have:

- Proven experience with EU-funded programmes (ENI programmes would be an asset)
- Proven experience with carrying out research, needs assessments and/or mapping studies (assessments/studies made for the EU would be an asset)

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.

The European Union pursues an equal opportunities policy. Gender balance in the proposed team, at all levels, is highly recommended.

4. LOCATION AND DURATION

➤ **Starting period** (indicative):

Provisional start of the assignment is April 2019

➤ **Foreseen finishing period or duration:**

Maximum duration of the assignment: 8 months

This overall duration includes working days, week-ends, periods foreseen for comments, for review of draft versions, debriefing sessions, and distribution of outputs

➤ **Planning**, including the period for notification for placement of the staff as per Article 16.4 a) of the General Conditions

As part of the technical offer, the framework contractor must fill in the timetable in the Annex IV (to be finalised in the Inception Report). The ‘Indicative dates’ are not to be formulated as fixed dates but rather as days (or weeks, or months) from the beginning of the assignment (to be referenced as ‘0’).

Sufficient forward planning is to be taken into account in order to ensure the active participation and consultation with government representatives, national / local or other stakeholders.

➤ **Location(s) of assignment:**

The main place of posting for the assignment is homebased. Further for each of the experts a minimum of 1 days will take place in Brussels and an indicative minimum of 15-20 days per expert will take place in all of the following 14 Neighbourhood countries:

- East: Armenia, Azerbaijan, Belarus, Georgia, Moldova, Ukraine.
- South: Algeria, Egypt, Jordan, Israel, Lebanon, Morocco, Palestine and Tunisia.

Missions to Syria and Libya are not foreseen due to security situation. Tasks related Syria and Libya would be included during missions to Lebanon/Jordan and Tunisia, respectively.

Per diem maxima for missions in the framework of EC-funded external aid contracts apply, and need to be respected in the financial offer. For the purpose of the Financial Offer for missions to countries in the Neighbourhood, the average per diem for the region (excluding Syria and Libya) of EUR 241 is to be used: https://ec.europa.eu/europeaid/sites/devco/files/perdiems-2017-03-17_en.pdf

Indicative division of home-based and mission days:

	Assignment	Location	Days
Main location	Inception, desk research and report	Home-based	60 (each expert) → 4x60=240 total

	writing		
Team leader	Mission: start and closing	Brussels	1
	Field mission	4 ENI South countries or 3 ENI East countries	20 (each country)* → 4x20=80 or 3x20=60 ⁺
Expert 1	Mission: start and closing	Brussels	1
	Field mission	4 ENI South countries or 3 ENI East countries	20 (each country)* → 4x20=80 or 3x20=60 ⁺
Expert 2	Mission: start and closing	Brussels	1
	Field mission	4 ENI South countries or 3 ENI East countries	20 (each country)* → 4x20=80 or 3x20=60 ⁺
Expert 3	Mission: start and closing	Brussels	1
	Field mission	4 ENI South countries or 3 ENI East countries	20 (each country)* → 4x20=80 or 3x20=60 ⁺
	Missions subtotal		284
Total			524 grand total

*The number of days per country is indicative and field mission can be shortened in one country in order to extend field missions in other country/ies and/or in order to focus on desk research and report writing.

⁺ Expert travelling to the 4 ENI South countries will spend indicatively 80 days on field missions. Expert travelling to the 3 ENI East countries will spend indicatively 60 days on field missions.

5. REPORTING

➤ **Content:**

Inception Note of max. 20pages will

- outline the work plan and timetable of activities of the team, including missions and phone interviews planning;
- outline the methodological approach to be used;
- outline the methodological approach to be used for the assessment prior to the country missions and stakeholders phone interviews;
- identify the operational and methodological challenges to be addressed by the Consultant for a successful completion of the assignment;
- outline in which form will the findings of the assessment be presented to the European Commission and the general public;
- provide in annexes a draft Table of Contents of the final report and a list of proposed stakeholders to meet during the country missions and/or to be interviewed by phone.

Interim Note of max. 40pages will

- report on the main findings of the country missions and the phone interviews;
- provide key insights about the current context (political and legal, existing donor assistance);
- outline the main gaps in donor assistance
- outline the main needs and challenges of independent media in the visited countries,

- based on the findings, formulate the first set of recommendations for the future EU-funded programmes to support independent media (both at bilateral as well as regional dimensions);
- include a 2-pages executive summary;
- provide in annexes mission reports and interviews minutes (including a list of people met and their contact details) as well as all other relevant additional documents as needed (annexes shall not exceed 20 pages altogether).

Final Report* of max.70 pages will

- provide an analysis of the current trends in the media sector in each country as well as in the Neighbourhood region (both in each region East and South separately, as well as in the Neighbourhood region as a whole), including
 - the current political and legal context,
 - the main challenges and opportunities for independent media in the Neighbourhood;
- provide an overview of the engagement of other donors in the media sector in each country as well as in the Neighbourhood region (both in each region East and South separately, as well as in the Neighbourhood region as a whole) and complementarity/overlaps with the EU interventions;
- provide an analysis of
 - the gaps in donor assistance as well as relevant lessons learnt,
 - the needs of the independent media in the Neighbourhood
- provide recommendations to the EU with the view of formulation of future assistance
 - recommendations targeted to the EU Delegations for future bilateral programmes in the Neighbourhood
 - recommendations targeted to the DG NEAR HQ for future regional programmes (both in each region East and South separately, as well as in the Neighbourhood region as a whole);

These recommendations should emphasize

- which gaps/needs are best tackled by which instruments/approaches
- the added value of regional intervention and where regional intervention should focus
- creative/innovative suggestions for providing effective assistance to independent media in difficult/restrictive contexts
- identify areas for specific activities or support to independent media for meaningful gender mainstreaming and RBA
- include a 5-pages executive summary;
- provide in annexes all other relevant additional documents (annexes shall not exceed 40 pages altogether).

The Final Report must be consistent, concise and clear and free of linguistic errors both in the original version and in their translation – if foreseen.

The Final Report should not be longer than the number of pages indicated. Additional information on the overall context of the Action, description of methodology and analysis of findings should be reported in an Annex to the main text.

The presentation must be properly spaced and the use of clear graphs, tables and short paragraphs is strongly recommended.

The cover page of the Final Report shall carry the following text:

“This study is supported and guided by the European Commission and presented by [name of consulting firm]. The report does not necessarily reflect the views and opinions of the European Commission”.

The Executive Summary should be a short, tightly-drafted, to-the-point and free-standing Executive Summary. It should focus on the key purpose or issues of the study, outline the main analytical points, and clearly indicate the main conclusions, lessons to be learned and specific recommendations.

****Please note that the final report will be considered a draft until it is formally approved by the European Commission.***

➤ **Language:**

The working language of this contract is English. All documents submitted to the European Commission shall be written in English.

➤ **Submission/comments timing:**

For each report, the Contracting Authority will send to the Contractor consolidated comments or the approval of the report within 15 calendar days. The revised reports addressing the comments shall be submitted within 10 calendar days from the date of receipt of the comments. The experts team should provide a separate document explaining how and where comments have been integrated or the reason for not integrating certain comments, if this is the case.

➤ **Number of report(s) copies:**

Two printed copies and electronic versions of all the outputs of this assignment (USB memory) at no extra cost.

6. INCIDENTAL EXPENDITURE

Not applicable for global price contracts such as the present one.

ANNEX I: SPECIFIC TECHNICAL EVALUATION CRITERIA

SPECIFIC GLOBAL PRICE TECHNICAL EVALUATION GRID Request for Services n° 2019/405598/1

Needs Assessment of Independent Media in the Neighbourhood
FWC SIEA 2018- LOT 3 : Human Rights, Democracy and Peace
EuropeAid/138778/DH/SER/multi

1. TECHNICAL EVALUATION CRITERIA

The Contracting authority selects the offer with the best value for money using a 80/20 weighing between technical quality and price. Technical quality is evaluated on the basis of the following grid:

	Maximum
Organisation and methodology:	50
Rationale, understanding of ToR and the aim of the services to be provided	15
Strategy, Overall methodological approach, quality control approach, appropriate mix of tools and estimate of difficulties and challenges	25
Backstopping and role of the involved members of the consortium	5
Organisation of tasks including timetable	5
Score for the expertise of the proposed team	50
Overall total score	100

2. TECHNICAL THRESHOLD

Any offer falling short of the technical threshold of 75 out of 100 points, is automatically rejected.

ANNEX II: INFORMATION THAT WILL BE PROVIDED TO THE EXPERTS TEAM

- Non-exhaustive list of EU-funded projects/programmes = marked as contributing significantly or mainly to climate change adaptation and/or mitigation (to be completed by the Contractor against findings from interviews and desk study)
- Related-projects/programmes studies, financing agreement, addenda, progress reports, technical reports and Result Oriented Monitoring (ROM) Reports
- Relevant evaluations, audit, reports
- Any other relevant document

Note: The experts team has to identify and obtain any other document worth analysing, through independent research and during interviews with relevant informed parties and stakeholders of the Action.