TERMS OF REFERENCE – PART A

How to complete these standard terms of reference: Please insert the information requested between the <> brackets, as appropriate for each tender procedure. Square brackets [ ] and parts shaded in grey indicate options to choose: they should be included when applicable. All other text should only need to be amended in exceptional cases, depending on the requirements of specific tender procedures. In the final version of each set of terms of reference, please remember to delete this paragraph, any other text with yellow highlighting, and to suppress all brackets.

1 BACKGROUND INFORMATION

2 OBJECTIVE, PURPOSE & EXPECTED RESULTS

➢ Global objective
➢ Specific objective(s)
➢ Requested services, including suggested methodology
  o In case of an expenditure verification is required, the contractor shall include the name of the proposed auditor in its methodology
➢ Required outputs
➢ Language of the Specific Contract
➢ Management team member presence required or not for briefing and/or debriefing

3 LOGISTICS AND TIMING

Please refer to Part B of the Terms of Reference.

4 REQUIREMENTS

Please refer to Part B of the Terms of Reference.

5 REPORTS

< If paper copies are required, please indicate the number here >

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

6 MONITORING AND EVALUATION

➢ Definition of indicators

< Specific performance measures chosen because they provide valid, useful, practical and comparable measures of progress towards achieving expected results. Can be quantitative: measures of quantity,

1 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.

2 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.
including statistical statements; or qualitative: judgements and perception derived from subjective analysis.

7 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 >

***
TERMS OF REFERENCE – PART B

BACKGROUND INFORMATION

1. Benefitting zone

2. Contracting authority

3. Contract language

LOCATION AND DURATION

4. Location

[If the “Expertise composition” of the RfS = “Request individual expert per position”]
- [Position title]:
  - Normal place of posting of the specific assignment: [normal place of posting of the specific assignment]
  - Mission(s) outside the normal place(s) of posting and duration(s): [other mission locations and indicative number]

[Position title]:
  - Normal place of posting of the specific assignment: [normal place of posting of the specific assignment]
  - Mission(s) outside the normal place of posting and duration(s): [other mission locations and indicative number]

Etc.

[Else if the “Expertise composition” of the RfS = “Request on expertise by a team”]
- Normal place(s) of posting of the specific assignment: [normal place of posting of the specific assignment]
- Mission(s) outside the normal place of posting and duration(s): [other mission locations and indicative number]

[Else if the “Expertise composition” of the RfS = “Expertise not defined by C.A. (=pure global price)”]

See part A of the Terms of Reference if a normal place of posting of the specific assignment is defined.

[End if]

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

**REQUIREMENTS**

6. Expertise

[If the “Expertise composition” of the RfS = “Request individual expert per position”]

For this assignment, one individual expert must be proposed for each position.

The expertise required for the implementation of the specific contract is detailed below.

- **[Position title]:**
  - General description of the position: [General description of the position]
  - Expert category: [Expert category]
  - Qualifications and skills required: [Qualification and skills required]
  - General professional experience: [General professional experience]
  - Specific professional experience: [Specific professional experience]
  - Language skills: [Language skills]
  - Number of working days: [Number of working days] days

[If “Additional information” is not empty]

- Additional information: [Additional information]

[End if]
Additional information: [Additional information]
[end if.]
Etc.
[end if]

[If the “Expertise composition” of the RfS = “Request on expertise by a team”]
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: [Language skills]

Requested number of days per category:

<table>
<thead>
<tr>
<th>Expert category</th>
<th>Minimum requirement concerning the category</th>
<th>Number of working days</th>
<th>Additional information</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Expert category]</td>
<td>[Minimum requirement concerning the category]</td>
<td>[Number of working days]</td>
<td>[Additional information]</td>
</tr>
<tr>
<td>[Expert category]</td>
<td>[Minimum requirement concerning the category]</td>
<td>[Number of working days]</td>
<td>[Additional information]</td>
</tr>
<tr>
<td>Etc...</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[If the “Expertise composition” of the RfS = “Expertise not defined by C.A. (=pure global price)”]

No expertise is defined by the contracting authority for this assignment. The contractor is responsible for proposing the expertise necessary to implement the specific contract.

However, the contracting authority may, where appropriate, decide to indicate an absolute minimum input in terms of working days and/or qualifications for one or more experts. If such case, please refer to Part A of the present terms of reference for additional information.
[end if]

7. Incidental expenditure

[If not applicable]: No incidental expenditure provided for in this contract. [End if]
[If applicable]:

The provision for incidental expenditure covers ancillary and exceptional eligible expenditure incurred under this contract. It cannot be used for costs that should be covered by the contractor as part of its fee rates, as defined above. Its use covers:

[Number] - [Incidental expenditure category] - [Incidental expenditure title]
Incidental expenditure description

[Number] - [Incidental expenditure category] - [Incidental expenditure title]

[Incidental expenditure description]

[Number] - [Incidental expenditure category] - [Incidental expenditure title]

[Incidental expenditure description]

[If a binding total provision is defined in the RfS:] The provision for incidental expenditure for this specific contract is [EUR for direct management, ISO code of national currency for indirect management] [amount]. This amount must be included unchanged in the budget breakdown. [End if]

[End if]

If applicable, see part A of the Terms of Reference for more details on the use of the incidental expenditure.

8. Lump sums

[If not applicable:] No lump sums provided for in this contract. [End if]

[If applicable:] 

[Number] - [Lump sum activity title]

[Activity description]

Number of time the activity should be performed: [Quantity]

[End if]

9. Expenditure verification

[If no Expenditure verification is required] No expenditure verification report is required [end if]

[If Expenditure verification is required for interim and final] An expenditure verification report is required for interim and final payments [end if]

[If Expenditure verification is required for final payment only] An expenditure verification report is required for final payment only [end if]

[If Expenditure verification is required]

The provision for expenditure verification covers the fees of the auditor charged with verifying the expenditure of this contract in order for the contracting authority to check that the invoices submitted are due.

Tenderers are required to indicate, in their “Organisation and Methodology”, the name and address of the proposed auditor or audit firm that will be in charge of producing the expenditure verification report(s).

The provision for expenditure verification for this contract is [EUR for direct management, ISO code of national currency for indirect management] [provision amount]. This amount must be included unchanged in the budget breakdown.

[If comment not empty] Comment: [Comment] [End if]

[end if]
## 10. Reports requirements

<table>
<thead>
<tr>
<th>Title</th>
<th>Content</th>
<th>Language</th>
<th>Submission timing or deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>[type]</td>
<td>[Description of content]</td>
<td>[Language]</td>
<td>[submission timing or deadline]</td>
</tr>
<tr>
<td>[type]</td>
<td>[Description of content]</td>
<td>[Language]</td>
<td>[submission timing or deadline]</td>
</tr>
<tr>
<td>[type]</td>
<td>[Description of content]</td>
<td>[Language]</td>
<td>[submission timing or deadline]</td>
</tr>
</tbody>
</table>