

Operational Evaluation Terms of Reference for External Expertise

March 2017

Public procurement funded with European funds

Interreg
*M*editerranean



EUROPEAN UNION



Table of contents

Table des matières

Table of contents	2
INTRODUCTION.....	3
I. Framework of the MED Evaluation Plan	5
II. Objectives and Scope of the Operational Evaluation	5
A. Objectives of the operational evaluation	5
B. Scope of the Operational Evaluation	6
III. Main users and responsibilities of stakeholders	7
IV. Evaluation Questions	7
A. Questions related to the effectiveness and efficiency of Programme management	8
B. Questions related to the effectiveness and efficiency of Programme implementation	8
C. Questions related to the effectiveness and efficiency of the Communication strategy	9
V. Evaluation Methods	9
VI. Available Knowledge	10
A. Analysis of relevant evidence available and use	10
B. Monitoring and data collection	11
VII. Expected services	12
A. management of tasks.....	12
B. phases of the operation.....	13
C. TIMETABLE.....	15
VIII. Desired skills and composition of the team.....	16
A. Desired skills	17
B. Desired composition of the Team	17
C. Conflict of interest.....	17
IX. State of the art of Programme implementation.....	17
X. Rules for applying	18

INTRODUCTION

The Interreg Mediterranean Programme (hereinafter Interreg MED Programme) is a transnational cooperation programme co-financed by the European Regional Development Fund (ERDF). It supports the sharing of experiences and knowledge and the improvement of public policies between national, regional and local authorities and other territorial actors of the MED area through the funding of cooperation projects. Its eligible territory includes 57 regions from 10 EU Member-States (Croatia, Cyprus, France, Greece, Italy, Malta, Portugal, Slovenia, Spain, United-Kingdom (Gibraltar)) as well as 3 Mediterranean States (Albania, Bosnia-Herzegovina and Montenegro) candidates to the EU or potential candidates participating with the Instrument for Pre-Accession assistance funds (IPA II Funds).

The **overall objective of the Interreg MED Programme** is « *to promote sustainable growth in the Mediterranean area by fostering innovative concepts and practices (technologies, governance, innovative services...), reasonable use of resources (energy, water, maritime resources...) and supporting social integration through integrated and territorially based cooperation approach* »¹.

For the 2014-2020 programming period, the total budget of the Programme is € 275.905.320 (€ 224.322.525 of ERDF, € 9.355.783 of IPA Funds, € 42.227.012 of national counterpart).

The Interreg MED Programme is managed by the Provence-Alpes-Côte d’Azur Region, acting as Programme Managing Authority (hereinafter MA), with the support of the Joint Secretariat (hereinafter JS) established in compliance with Article 23(2) of Regulation (EU) N° 1299/2013, placed at Marseille (France).

Based on the experience gained during the programming period 2007-2013 and on the main conclusions of the *in itinere* evaluation undertaken during that programming period, the Programme has adopted several key innovative measures regarding some aspects of the Programme implementation in order to improve the quality of the results of the programmed projects and to increase the achievement of the Programme objectives and the impact on its territory. This situation makes the organisation of the Interreg MED Programme unique and significantly different from other cooperation programmes.

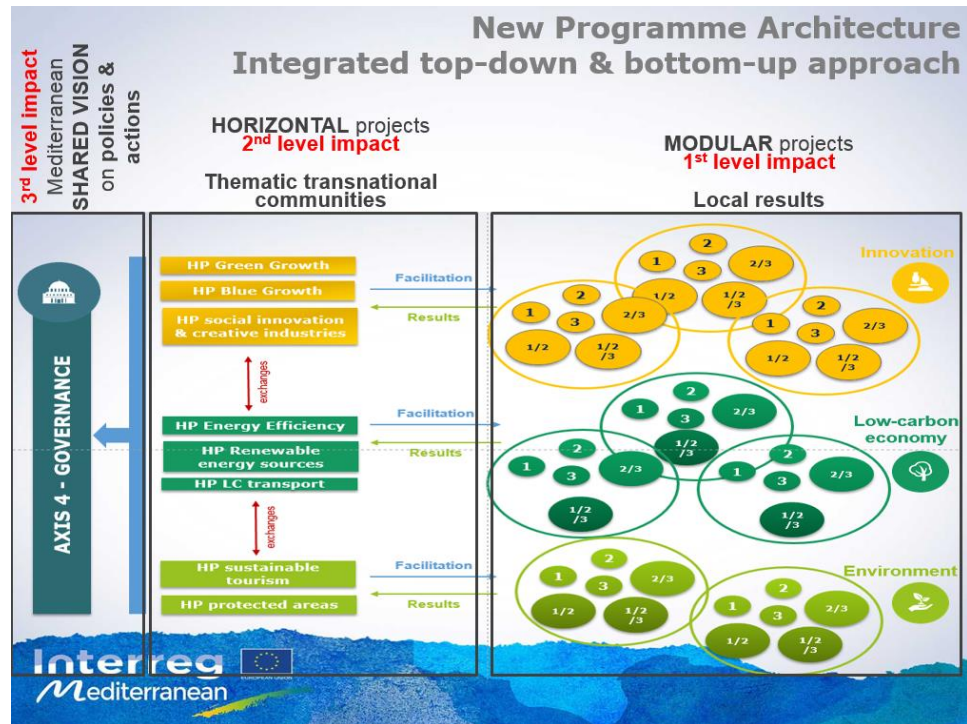
The main innovative measures adopted can be summarised as follows:

- The establishment of a **new Programme architecture** with different typologies of projects (Modular and Horizontal projects and Platform projects²).

The Interreg MED architecture, with the links between the different types of projects, can be materialised with the following scheme:

¹ Interreg MED Cooperation Programme 2014-2020 validated by the EC on June 2nd, 2015.

² See Factsheets “Modular projects” and “Horizontal Project” for details regarding the architecture of the Programme and the different types of projects.



- The increase of **thematic specialisation** that results in the launching of target calls through the use of specific Terms of Reference, targeting themes, actions and activities, for each specific objective or sub-theme, and the carrying out of a specific qualitative and thematic follow-up of projects implementation;
- The design of a **communication strategy** conceived as a tool allowing a better coordination between the actors that participate in the Programme, and contributing to reach their objectives;
- The development of a **project community approach**, based on the fostering of thematic communities integrated by relevant stakeholders of the MED area;
- The establishment of **capitalisation** as a key element to ensure the sustainability and durability of Programme results.

Further information and relevant documents concerning the Interreg MED Programme can be found on the Programme website: www.interreg-med.eu.

In this context, the present Terms of Reference aims at outsourcing part of the Evaluation of the Programme, the **Operational Evaluation**. It presents its objectives and scope, the aspects regarding the conduct of the evaluation, the roles and responsibilities and the resources available.

I. Framework of the MED Evaluation Plan

In compliance with article 54 of Common Provision Regulation (Regulation (EC) N° 1303/2013), all Programmes supported by ESI funds shall carry out evaluations to improve the quality of the design and implementation of programmes, as well as to assess their effectiveness, efficiency and impact. To do so, the Interreg MED Programme has adopted, on May 27th 2016, an Evaluation Plan (hereinafter the MED Evaluation Plan) that sets out the Programme Evaluation Strategy.

According to this document, the main aims of the evaluation are for the Programme Authorities to assess the level of impact of the Programme, understand the mechanism(s) that lead(s) to the results and be provided with solutions to improve the management and implementation mechanisms of the Programme.

The Programme foresees a two-step strategy:

- A **Process or Operational³ Evaluation** focusing on the optimisation of the performance of the Cooperation Programme, preparing the ground for impact evaluation. This evaluation will be continued, starting from late 2017 until 2020
- An **Impact Evaluation** focusing on the effects of the Programme implementation on the MED area occurring during the 2019-2022 period.

The Monitoring Committee of the Interreg MED Programme has decided to outsource those two evaluations through two different public procurements in order to select the best external experts for each of them. However, at the end, a synthetic analysis setting out the final conclusions and recommendations, comprising both evaluations, will be drafted by the expert in charge of the impact evaluation⁴. In order to do that, the cooperation between both external experts should be foreseen.

The present Terms of Reference focuses on the first aspect, the Operational Evaluation.

II. Objectives and Scope of the Operational Evaluation

A. OBJECTIVES OF THE OPERATIONAL EVALUATION

The overall goal of the operational evaluation is *to assess the effectiveness and efficiency of the Programme management and implementation*, including in terms of communication and application of horizontal principles, by bringing insights and recommendations for the improvement of the intervention design as well.

The **specific objectives** of the operational evaluation are:

- To establish the added value of the innovative measures adopted by the Programme;

³ Kindly note that in this context the expressions « process evaluation », used in the framework of the Evaluation Plan, and « operational evaluation », used in the present document, should be considered as synonyms.

⁴ The launching of the public procurement of the impact evaluation is foreseen in early 2019.

- To detect weaknesses in the Programme management and implementation in order to take suited corrective measures and thereby improve the Programme management and implementation process;
- To determinate the feasibility and readiness for the development of the Programme impact evaluation;
- To feed the strategy for the building of the Programme for the next programming period.

Based on the overall goal of the operational evaluation, the focus should put on the following **evaluation criteria**:

- Effectiveness: concerns whether the Programme is on good track to achieve the objectives and expected results as formulated in the Interreg MED Cooperation Programme.
- Efficiency: compares the actual outputs and the inputs – the resources mobilised.

B. SCOPE OF THE OPERATIONAL EVALUATION

The Programme Authorities wish to place special emphasis on aspects related to the design, management, implementation and outcome of the **innovative key measures, mentioned in the introduction**, adopted for the programming period 2014-2020, as well as their communication, assimilation and appreciation by applicants, beneficiaries and other relevant stakeholders. Special attention will be paid to their contribution to the effectiveness and efficiency of the Programme management and implementation that can be found in each of these topics.

Considering this, the operational evaluation will mainly focus on the **topics** presented thereafter related to the management and implementation of the Programme:

- Programme management:
 - Management structures
 - Decision making procedures
- Progress of Programme implementation:
 - Project cycle: Project application and selection procedures; reduction of administrative burden; Project monitoring systems and mechanisms
 - Processes and tools used to monitor the progress in terms of achievement of programme objectives and performance framework
 - Respect of Horizontal principles
 - Contribution to EU2020 strategy and macro-regional strategies
- Communication strategy (internal and with stakeholders and beneficiaries):
 - Objectives, results
 - Approaches and activities
 - Partner involvement

The operational evaluation should cover all implementation actions undertaken in the framework of the Programme related to the programming period 2014-2020. The Interreg MED Programme is an on-going programme since several calls for proposals have been launched and 69 projects have been already selected. During the lifetime of the operational evaluation, the implementation by Programme Authorities of all measures to be evaluated will have started. New calls for proposals will be launched; the last one being foreseen at the end of the programming period (2020), depending on the availability of funds. This means that tenderers should propose an adequate methodology to ensure the scope of the evaluation is sufficiently covered and includes:

- The entire cooperation area
- All priority axes and specific objectives
- All types of calls for proposals and all types of projects

Tenderers should plan evaluation activities in accordance with the Programme implementation, as well as the reporting obligations towards the Commission and the coordination with the Impact evaluation. In their proposal, they should specify the timing of activities and related content of evaluation reports. This will be further detailed and specified during the inception phase.

III. Main users and responsibilities of stakeholders

Based on the specific objectives established for the operational evaluation, the main users of its results will be the Programme Authorities; especially the MA, the JS and the Monitoring Committee of the Interreg MED Programme.

The results (including recommendations) will also be communicated to all stakeholders and published on the website for public awareness. For that, documents, reports, summaries and means of communication will always be targeted to public for a more relevant dissemination and effect on stakeholders.

Finally, findings will be reported in Programme reports (Art. 50 (2) and 144 (2) of Regulation N°1303/2013). Tenderers have to adjust to match the reporting requirements and be of use for the EC.

Further information regarding evaluation functions and responsibilities and target audience are available in the MED Evaluation Plan.

IV. Evaluation Questions

The evaluation questions listed below have been developed by the MA/JS in collaboration with the Evaluation Working Group (EWG)⁵. Tenderers are invited to include in their proposal adjustments to the proposed questions and/or additional questions, with demonstrated justification, highlighting the added value of their proposal as well as its link to the methodology

⁵ The Interreg MED Programme has set up an Evaluation Working Group (hereafter EWG) composed of Members from the JS and national experts assigned on a voluntary basis by Participating States which is in charge of discussing technical proposals prior to submission to the Monitoring Committee of the Programme and enhancing the technical/methodological quality of the evaluation process. More information can be found in the Med Evaluation Plan and the document for setup of the EWG.

selected. The hereafter listed main questions are compulsory, while sub-questions can also be better specified by the tenderers in their proposal.

Furthermore, the tenderers should take into account, in their schedule, the progression of the Programme implementation (see point IX), in order to tackle the questions and sub-questions at the most relevant timing during the evaluation process. In that sense, evaluation activities can differ during the contract lifetime, depending on the state of implementation of the Programme, and the content of each evaluation report should be consistent with the Programme implementation progress and needs.

A. QUESTIONS RELATED TO THE EFFECTIVENESS AND EFFICIENCY OF PROGRAMME MANAGEMENT

Main question 1: To which extent the Programme management mechanisms are suited to implement the Programme strategy?

- Have Programme Authorities (MA, JS, NCP, members of the Committees...) staff sufficient capacities for fulfilling their tasks?
- Are decision making processes clear and transparent? Are decision making processes sufficient and effective?
- Are the means to implement the innovative measures of the Programme sufficient?
- Are Programme management tools and procedures used in an effective and efficient way?
- Is the use of the different online monitoring tools the Programme has to work with (belonging to the Programme or to other Authorities, eg the Certifying Authority or the European Commission) well coordinated and complementary?
- Are the mechanisms implemented to ensure relevant partners involvement in Programme implementation sufficient and effective?
- How effective is the coordination with and contribution to other Interreg Programmes or initiatives in the area?

B. QUESTIONS RELATED TO THE EFFECTIVENESS AND EFFICIENCY OF PROGRAMME IMPLEMENTATION

Main question 2: How effective and efficient is the Programme supporting process towards applicants and beneficiaries regarding project cycle?

- How is Programme architecture influencing its implementation? Have beneficiaries understood the new approach in a satisfactory way for benefiting the Programme implementation?
- Has the Programme set adequate measures to reduce the administrative burden of applicants and beneficiaries?
- Are the different supportive measures offered to beneficiaries regarding project implementation, monitoring and follow-up adequate to increase the quality of project results? (qualitative and thematic follow-up, Programme documents and online monitoring tools, JS support)
- To which extent the strategy towards capitalisation and mainstreaming of the Programme contribute to a better sustainability and durability of project results?

Main question 3: Are the reporting and monitoring process and tools of project implementation adequate to ensure proper follow-up of Programme achievements? And to which extent does this happen?

- To which extent does the indicator system allow for the provision of a complete and accurate picture of the implementation of the Programme?

- How is the Programme progressing towards its goal and objectives in relation to the available means and resources?
- Does the indicator system, used to measure outputs and results, help towards the efficient monitoring of the Programme? To which extent is the quality of data and indicators reliable?
- To which extent the Programme's annual reports reflect the individual and the thematic achievements of the projects?

Main question 4: To which extent the measures set by the Programme for the application of the Horizontal Principles are effective to contribute to the EU strategy?

Main question 5: To which extent the Programme implementation contributes to the EU2020 strategy and relevant macro-regional strategies?

C. QUESTIONS RELATED TO THE EFFECTIVENESS AND EFFICIENCY OF THE COMMUNICATION STRATEGY

Main question 6: To which extent the communication strategy of the Programme has contributed to a greater visibility and awareness raising?

- How effective are Programme communication actions towards applicants and beneficiaries? Events (Applicant seminars, LP seminars, thematic events, national events, trainings, ...), communication and information campaigns, use of social networks, participation in external events, ...
- How effective is the Programme supporting process towards beneficiaries regarding communication issues during project implementation?
- How has the common web platform helped projects to raise awareness on their results?
- How has the common web platform helped Programme to raise awareness on its results?
- To which extent have measures undertaken to enhance stakeholders' involvement been effective, at project and Programme level?

Main question 7: Has the focus on (thematic) community building enhanced the results of the Programme?

- How effective are Programme measures to support the setting-up of thematic communities?
- To which extent horizontal projects contribute to the setting-up and animation of thematic communities?
- To which extent the community building approach established by the Programme trigger synergies and capitalisation at project and Programme level?

V. Evaluation Methods

Tools and methods for the operational evaluation should be specified by the tenderers in their proposals. The methodology should be the most appropriate for answering the evaluation questions, taking into account the specificities of the Programme and its context. Tenderers should, however, ensure that the collection of primary data includes consultation with wide range of projects and Programme stakeholders, a representative sample covering the whole area of the MED Programme, and that the insights of these groups are included in the reports. Questions and methods shall also be adapted according to upcoming needs during the Programme cycle.

The use of a combination of methods will be encouraged in this evaluation. The proposal should outline how methods will be combined to deliver the required reports, how will the consultation

be conducted with the relevant stakeholders and answer the evaluation questions. Based on an overview of information published and listed in the documents of reference (see point VI), the tenderers should analyse the major difficulties inherent in carrying out this contract and outline strategies to overcome them.

The evaluation questions and methods included in the proposal are to be further outlined and detailed during the inception phase (see timetable, point VII).

VI. Available Knowledge

The MA/JS will provide the contractor with access to the necessary and available data for the purpose of the evaluation. Knowledge already available is at the disposal of tenderers in annex and on the Programme website. Data that will be collected during Programme implementation, required by the evaluators for their work and available from the MA/JS, the Monitoring Committee or the EWG will be accessible to them upon request through dedicated contact persons. Meetings or interviews can also be set up upon demand.

A. ANALYSIS OF RELEVANT EVIDENCE AVAILABLE AND USE

Considering that the Programme has built its strategy based upon previous experience of Med Programme 2007-2013, and that a number of useful documents are already available, it is expected from the Tenderers to carefully analyse and usefully exploit available data coming from the following documents:

- Common Provision Regulation (EC N° 1303/2013) (see <http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A32013R1303>)
- Interreg MED Programme Evaluation Plan (see document 01)
- Evaluation Working Group setting up document (see document 02)
- Interreg MED Cooperation Programme (cf. <http://interreg-med.eu/toolbox/reference-documents/>)
- Interreg MED Programme Manual (see <http://interreg-med.eu/toolbox/reference-documents/>)
- Ex-ante evaluation (see document 03)
- Strategic environmental assessment (see documents 04)
- In-itinere evaluation 2007-2013 (see document 05)
- EC 2007-2013 Ex-Post Evaluation on ETC (see http://ec.europa.eu/regional_policy/sources/docgener/evaluation/pdf/expost2013/wp11_final_report.pdf)

Regarding the last three documents, an analysis of available knowledge from those documents is detailed in the MED Evaluation Plan.

B. MONITORING AND DATA COLLECTION

The MA/JS is in charge of the monitoring mechanisms for the Programme implementation and of providing evaluators with relevant and reliable data from the Programme to enable the sound implementation of the evaluation activities.

Information related to **Programme procedures** (both internal to Programme Authorities and external) is documented in several Programme documents; mainly the Programme Manual is addressed to applicants and beneficiaries, the Description of Management and Control System and an Internal Guidance of Procedures are addressed to the staff of the MA and the JS. Those last two documents will be provided only to the selected tenderer during the inception phase.

On the other hand, **the JS has foreseen mechanisms for** data collection and outputs monitoring that will provide Programme statistic **information relevant for the monitoring of the Programme implementation**. Those mechanisms include the use of several tools that are presented here below.

Synergie CTE – The on line monitoring tool of the Interreg MED Programme

According to article 72 of the Regulation (EU) N°1303/2013, the Interreg MED Programme uses a computerised system for accounting, for the storage and transmission data on indicators, for monitoring and for reporting, called SYNERGIE CTE. This monitoring tool is used by different Programme Authorities.

SYNERGIE CTE stores data from the application forms, the assessment of proposals, the progress reports and the expenditures. This includes: data on submitted and approved projects, on partners, on activities planned and performed, on outputs and deliverables planned and delivered, on target groups reached, on expenditures spent, certified and reimbursed, on eligibility and quality assessment, on themes tackled.

In the MED Evaluation plan, a summary of the different stakeholders that will use it, how it will be mainly used and the main data that can be collected through the online-tool is available under the Monitoring and Data Collection section.

The Web Platform

The Interreg MED Programme has designed and is developing a Web Platform that will not only serve the quality of the implementation of the projects but also enable the collection of reliable and accurate data on the projects implementation and outputs. Via the platform, the Programme will supply projects with interconnected websites and with management tools that will contribute directly to report on output indicators.

In addition, the web platform and social media will provide essential information for the assessment of the audience and will be used to perform surveys and analysis for public uses. Directories for partners, applicants and beneficiaries should also be created and regularly updated thanks to the platform. This will support the survey and interview process.

In the MED Evaluation plan, a summary of the types of data that will be retrievable thanks to the platform is available under the Monitoring and Data Collection section.

The Horizontal Principles

The Programme intends to follow-up concretely the measures and actions taken by the projects and the Programme bodies to apply the horizontal principles (sustainable development, equal

opportunities and non-discrimination, equality between men and women). In the MED Evaluation plan, a summary of actions planned to follow up those measures is available.

Communication

The Programme proceeds with regular analysis of its Communication strategy and implementation measures. The analysis of the communication measures will benefit from the collectable data such as: web statistics, number of followers in social media, registration tool, surveys performed thanks to the platform tools. Above mentioned data will be provided to the evaluators to support them in the external evaluation of the communication strategy of the Programme.

Other sources of data

All other data needed for performing evaluation activities should be retrieved from existing national databases and all other databases and data available thanks to European, national, regional or local initiatives (such as ESPON, Eurostat, GIS data, etc.).

To reinforce the quality-oriented approach of the Programme, a mechanism of self-evaluation of projects has been put in place and will be available for the Evaluators as specific input regarding projects' implementation.

VII. Expected services

Candidates can find below the compulsory deliverables that must be submitted by the evaluators. However, tenderers may include in their proposals other deliverables in accordance with the proposed methodology, including those relating to evaluation questions, evaluation themes or any other self-sustaining action.

However, the AG / SC may request minor specific contributions to adapt to the implementation stages of the Programme, allowing, for instance, that the results of the evaluation benefit to the launch of new calls for proposals or to the modification of the Strategy.

A. MANAGEMENT OF TASKS

The JS will be in charge of the day-to-day contact with the evaluator. In addition, the Evaluation Working Group (EWG) composed of members from the JS and a pool of national experts assigned by Participating States will be in charge of discussing technical proposals prior to submission to the Monitoring Committee and enhancing the technical/methodological quality of the evaluation process.

Prior to its submission to the Monitoring Committee, any report or document will be revised by the JS also upon advice of the EWG. Based on the comments received, the contractor has to prepare the final draft versions of the reports to be submitted to the MA and the Monitoring Committee.

The evaluator team may be invited to present and discuss the findings as included in the evaluation reports in the framework of a Monitoring Committee meeting. If needed, the conclusions of the discussions should be incorporated to the final version of the reports.

The JS will adopt an interactive and iterative process with the contractors (planning review of methodological approach, work in progress, etc.) favouring flexibility and enabling relevant adaptation of activities to needs and update of measures in Programme implementation.

In order to allow the JS to follow the evolution of the evaluation, the JS will organise coordination meetings with the evaluation team (phone or video) to monitor progress of the work plan established, identify eventual deviations and take appropriate corrective measures. Following each coordination meeting the contractor shall draft and submit to the MA/JS, within a week, a list of decision points for validation.

Moreover, the evaluation team will submit to the JS a progress report of 2 pages maximum every two-month, summarising the activities undertaken during this period and planning next steps.

Finally, tenderers should foresee a quality control system for the implementation of the evaluation that will be detailed in their proposal.

The management of tasks runs for the entire duration of the contract, so the price must be integrated into each of the three phases of the operation (see point B below).

B. PHASES OF THE OPERATION

Three phases are planned: inception phase, implementation phase and final phase. The meetings with the MA / JS mentioned below will take place mainly at the JS premises in Marseille (France). However, for practical reasons, certain meetings may take place elsewhere on European territory.

Inception phase:

- **A kick-off meeting** for the operational evaluation is expected to take place not later than two weeks following the award of the service contract. At this meeting all relevant elements from the Terms of Reference will be discussed, particularly the methodological approach and tools, the detailed time plan of the assignment as well as the detailed contents of the first set of tasks to be implemented.
- Following the kick-off meeting, the evaluators will be requested to provide an **inception report** within a month. This document must be discussed and agreed with the EWG. It will represent, for the whole duration of the exercise, the main point of reference of the quality assurance process, as it states in detail what can be expected from the exercise, the points in time at which the different activities will be performed, and the process through which the evaluation reports will be produced. The Inception report shall describe among others the following:
 - the main stakeholders identified;
 - the most relevant evaluation questions for each stakeholders' group type (elaborated and possibly restated);
 - the methods and tools to be employed;
 - the list of available data to be useful for the operational evaluation;
 - a detailed work plan with the division of labour between the different members of the team;
 - the (finalised) schedule for the work, including the various milestones. In this schedule, the tenderers should take into account the different implementation steps of the Interreg MED Programme and address evaluation questions accordingly;
 - description of the work flows and interactions with the Programme bodies;
 - description of the role and responsibilities of each member of the evaluation team;

- the intermediary and final outputs, including an overview of evaluation questions and Programme implementation steps assessed in each of them.

Implementation phase:

- **Intermediary meetings**, scheduled in accordance with the timetable for the reporting to the CE and the delivery of key outputs and deliverables (at least twice a year).
- **Participation in meetings with the Programme Monitoring Committee:** a maximum of two meetings with the Monitoring Committee should be held in one of the Programme participating regions.
- **Interim reports:** Draft documents of interim reports should be scheduled to be sent in a reasonable time prior to the deadline for the submission of the reports allowing enough time for consultation of the EWG, in order to secure time for the suggestion of improvements
 - **Interim Report in 2018**

This report should highlight the main achievements of the operational evaluation activities and include findings related to the core operational evaluation activities, concentrated during the years 2017- 2018, as well as recommendations for future calls and Programme adjustments. For communication purposes, **a specific version of the main conclusions** should be provided by the team of evaluators (conclusions adapted to the different target groups identified)
 - **Interim Report 2019**

This report should highlight the main achievements of the operational evaluation activities concentrated during the years 2018-2019 and include findings related to the core operational evaluation activities as well as already visible results coming from the adjustments implemented. It should provide the necessary information for the Complete Implementation Report to be delivered in 2019 to the Commission (including the Performance Review), as well as recommendations for future (eventual) calls and Programme adjustments. For communication purposes, **a specific version of the main conclusions** should be provided by the team of evaluators (conclusions adapted to the different target groups identified)
- **Methodologies and tools:** The evaluation team should provide the methodologies developed and the tools used to ensure qualitative delivery of evaluation and accuracy of data, like:
 - Quality criteria for quality of data to be used
 - Methodological approaches to be applied
 - Quality of analysis to be performed
 - Data collection tools and practicesData and methods will be provided by the evaluation team and reviewed by the pool of experts within the EWG prior to the start of each evaluation activity.
- **Report on the feasibility and readiness** for the development of the Programme impact evaluation:

This specific report should provide the Programme Authorities with information regarding the readiness of the Programme to launch an evaluation impact, including strengths and weaknesses, points of attention and any other relevant information that will serve the Programme Authorities for launching the Impact evaluation (strengths and weaknesses, points of attention...)

Final phase:

- **Final meeting**, prior to the delivery of the final report.

- **Final Report in 2020 :**

The draft should be scheduled to be sent in a reasonable time prior to the deadline for the submission of the report allowing enough time for consultation of the EWG, in order to secure time for the suggestion of improvements.

This report should highlight the main achievements of the operational evaluation activities and findings as a whole, assess the adjustments already implemented, and provide information to feed the strategy for the building of the Programme for the next programming period. For communication purposes, a **specific version of the main conclusions** should be provided by the team of evaluators (conclusions adapted to the different target groups identified)

- **Participation in meetings/events:** The contractor must foresee its participation in a maximum of two meetings/events in which he/she can present the results of the final report.

C. TIMETABLE

Indicatively, the operational evaluation will take place from the notification of the contract (estimated to June 2017) until May 2020⁶.

Evaluation activities should be planned in accordance with the Programme implementation, as well as the reporting obligations towards the Commission. The MED Evaluation Plan summarises the different obligations in terms of reporting to the Commission (see Timetable section).

The timetable for the operational evaluation and the main deliverables are presented in the table below:

Phase	Key milestones and deliverables	Deadlines for key milestones and deliverables
Inception	Kick-off meeting with MA/JS and EWG	DATE OF NOTIFICATION + 2 WEEKS
	Inception report	DATE OF NOTIFICATION + 1 MONTH AND 2 WEEKS
Implementation	Methodologies and tools	31 DECEMBER 2017
	Interim Report 2018	31 MARCH 2018
	Report on the feasibility and readiness for the development of the Programme impact evaluation	31 DECEMBER 2018
	Interim Report 2019 – contribution to the report to the commission	31 MARCH 2019
Final	Final meeting with MA/JS and EWG	31 MARCH 2020
	Final report	31 MAY 2020

Please note that the deadlines indicated in the table legally bind the contractors.

⁶ For information, the impact assessment is planned from 2019 to 2022.

Structure of evaluation reports

The evaluation interim and final reports should reflect the following general structure:

1. Executive summary containing conclusions and recommendations (maximum 5 pages)
2. Context of the report
3. Methodological framework outlining the evaluators' approach and including a description of original research undertaken, sources of data and information and methods used. It should also include a statement of the evaluators
4. Identification of key issues at the end of every section and conclusions drawn based upon them
5. Conclusions answering the evaluation questions. Findings and evidences
6. Recommendations of the evaluation team clearly graded in order of their importance (in terms of usefulness)
7. For the final report, suggestions for improvements on a long-term basis, including future aspects and various scenarios that might be useful for the next programming period
8. As an annex, all rough data collected (issued from surveys, interviews, analysis...) should be delivered to the MA, as well as a list of persons that have been contacted.

Format of evaluation reports

Deliverables produced in the framework of the contract must respect the following guidelines regarding their format:

- Draft reports and methodologies should be provided in English only. Final versions of reports should be provided into English and French
- Evaluation deliverables must be easy readable, illustrative and well structured. The experts are not expected to provide scientific research, including voluminous theoretical considerations.
- The contractor will provide presentation material in English for each interim and final report (PowerPoint or equivalent application compatible with MS Office) for the use of the Programme Authorities.
- All reports and documents produced for the Programme shall conform to the corporate visual identity of the Interreg MED Programme by applying the graphic rules set out by the Programme that commits to provide all related documentation. Templates will be provided by the Programme.
- All reports and documents produced for the Programme must respect the publicity and information rules (eligibility) according to EU and Programme rules.
- An electronic version of each report is required, in a reusable and presentable format (eg word and PDF for a report)
- An electronic version and a hardcopy version of key outputs are required.

VIII. Desired skills and composition of the team

A. DESIRED SKILLS

It is hoped that the contractor will have the following knowledge:

- Experience in the field of theory and practice of socioeconomic analysis and evaluation with at least two projects delivered in this field in the last three years.
- Have knowledge of fundamental features of Cohesion Policy and of European Territorial Cooperation in particular.
- Have knowledge of European policies and strategies of regional development in the Mediterranean.
- Have good written and oral command of English and French which are the official languages of the Programme.
- Have experience in data collection, data analysis and verification, statistical analyses and drafting reports and recommendations.
- Have relevant links/background to applied research on regional development, European regional politics and/or other areas relevant for the Programme, particularly in the themes tackled by the Programme: innovation, energy efficiency, renewable energy, urban transport, sustainable tourism, biodiversity, governance / macro-regional strategies.

B. DESIRED COMPOSITION OF THE TEAM

The team delivering the service should fulfil, as a minimum, the following expectations:

- Project Manager: At least 10 years' experience in project management (overseeing project delivery, quality control of delivered service, client orientation, conflict resolution, ...), team management and evaluation processes, and hold a Master's degree or equivalent in a field relevant to the services to be provided.
- Experts members of the team: At least 5 years' experience and hold a degree at bachelor's level or equivalent in a field relevant to the services to be provided

C. CONFLICT OF INTEREST

In order to ensure the independence of evaluations, evaluators **participating in the Programme as direct beneficiaries** of the current programming period (project partners) **will not be considered**.

Any participation as a service provider for an approved project must be notified to the MA/JS in order to avoid any conflict of interest.

Candidates must detail in their tenders the procedure they put in place to guarantee the independence of the evaluators and avoid situations of conflict of interest

IX. State of the art of Programme implementation

For information, please acknowledge that at the date of the signature of the contract with the tenderer (June 2017), the following milestones of the Programme will have been reached:

- Programme Management:
 - Organisation and holding of Steering Committee and Monitoring Committee meetings and working group meetings;
 - Approval of Committees rules of procedure;
 - Drafting of the internal guidance for the staff of the MA and the JS;
 - Set up of 13 National Contact Points;
 - Establishment of a monitoring system for Technical Assistance;
 - Drafting and approval of an Evaluation Plan (+ Annual update);
 - Reporting to the EC according to EU regulation.
- Programme implementation:
 - Organisation and holding of the Programme kick-off event (June 2015); Organisation of applicant seminars, LP seminars and Programme events;
 - Drafting of the Programme Manual and other documents for applicants and beneficiaries;
 - Launching of 2 calls for proposals in 2015 (modular and horizontal projects) and selection and start-up of 69 projects;
 - Launching of 2 calls for proposals in 2017 (Application and selection process on going. Selection foreseen at the end of 2017), based on the results of the 2015 call;
 - Set up of the on-line monitoring tool;
 - Preparation and submission of Axis 4 Platform project (starting within 2017);
 - Administrative and thematic follow up of projects.
- Communication strategy (internal and with stakeholders and beneficiaries) and Project community approach :
 - Set up of the web platform;
 - Drafting and approval of Communication Strategy (+ Annual update);
 - Specific activities and events for the consolidation of the thematic communities.

X. Rules for applying

For information, all the rules related to this public procurement are set out in the document named "Règlement de la Consultation (RC)" (in French only). This document describes, notably:

- the application procedure
- the content of the offers
- the selection criteria