

Terms of Reference (TOR) for the final Evaluation of the project Promotion of social dialogue in the Southern Mediterranean Neighborhood SOLID II - November 2024

ENI/2020/418-538

1. Background

Intervention to be evaluated:

Title of the intervention	Promotion of social dialogue in the Southern Mediterranean Neighbourhood SOLID II
Budget of the intervention	EUR 3 333 250 (EU contribution EUR 3 000 000)
Dates of the intervention	01/12/2020 – 30/09/2024
Geographic scope	Southern Neighbourhood (Jordan, Morocco, Tunisia, Lebanon, Algeria, and Palestine)
Implementing partners	International Trade Union Confederation (ITUC) Arab Trade Union Confederation (ATUC) Union of Mediterranean Confederations of Enterprises (Businessmed) Arab NGO Network for Development (ANND)

The SOLID II regional project aims to promote multipartite social dialogue (SD) in the Southern Mediterranean region.

Building on the SOLID I pilot phase (2016-2019), SOLID II covers six countries: Jordan, Morocco, Tunisia, Lebanon, Algeria, and Palestine.

The project, co-funded by the European Union (EU) and implemented by a consortium including ITUC, ATUC, BUSINESSMED, and ANND, spans from December 2020 to September 2024.

The overarching goal of SOLID II is to contribute to improved social dialogue in the Southern Mediterranean region, by fostering an enabling environment, supporting institutionalized frameworks, promoting a community of practice including new actors such as Economic and Social Councils (ESCs), local authorities, professional associations, and civil society organizations (CSOs).

The project has focused on improving the effectiveness of social dialogue to address pressing socio-economic and political challenges, particularly in the wake of the COVID-19 pandemic, economic instability, and political unrest across the region. These challenges include high unemployment rates, fragile governance structures, growing poverty, and limited civic engagement.

In addition, the socio-political landscape of the region plays a key role in shaping the dynamics of social dialogue, with each country facing distinct issues such as governance deficits, political transitions, and civic restrictions. The project recognizes that addressing socio-political contexts is essential for the success of social dialogue initiatives, and that social partners play a key role in addressing these challenges.

The project is supported by the EU as part of its regional cooperation with the Southern Neighbourhood, aligned with the priorities of the 2021 Agenda for the Mediterranean¹. It is complemented by a second EU-funded project in support to social dialogue for formalization and employability (SOLIFEM, implemented by the International Labour Organisation). Both SOLID and SOLIFEM reflect the priorities of the Union for the Mediterranean Ministerial Declaration on Employment and Labour of 2022.

Stakeholders of the intervention:

- International Trade Union Confederation (ITUC)
- Arab Trade Union Confederation (ATUC)
- Union of Mediterranean Confederations of Enterprises (Businessmed)
- Arab NGO Network for Development (ANND)
- European Union (EU)
- Economic and Social Councils (ESCs)
- Local Authorities in Target Countries: Jordan, Morocco, Tunisia, Lebanon, Algeria, Palestine
- Professional Associations, including Chambers of Commerce, industry-specific associations (e.g., construction, agriculture, manufacturing), employers' federations, and professional unions (e.g., healthcare, education, engineering, law)
- Civil Society Organizations (CSOs)
- European Commission DG NEAR
- European Commission DG EMPL

2. Objectives of the Evaluation and evaluation criteria

Systematic and timely evaluation of its programmes and activities is an established priority² of the European Commission³. The focus of evaluations is on the assessment of

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https://www.eeas.europa.eu/sites/default/files/joint_communication_renewed_partnership_southern_neighbourhood.pdf

² COM(2013) 686 final "Strengthening the foundations of Smart Regulation – improving evaluation" - http://ec.europa.eu/smart-regulation/docs/com_2013_686_en.pdf; EU Financial regulation (art 27); Regulation (EC) No 1905/2006; Regulation (EC) No 1889/2006; Regulation (EC) No 1638/2006; Regulation (EC) No 1717/2006; Council Regulation (EC) No 215/2008

³ SEC (2007)213 "Responding to Strategic Needs: Reinforcing the use of evaluation", http://ec.europa.eu/smart-regulation/evaluation/docs/eval_comm_sec_2007_213_en.pdf; SWD (2015)111 "Better Regulation Guidelines", http://ec.europa.eu/smart-regulation/guidelines/docs/swd_br_guidelines_en.pdf; COM(2017) 651 final 'Completing

achievements, the **quality** and the **results**⁴ of interventions in the context of an evolving cooperation policy, with increasing emphasis on **result-oriented approaches and the contribution towards the achievement of the SDGs**.⁵

From this perspective, evaluations should **look for evidence of why, whether and how the EU intervention(s) has/have contributed to the achievement of these results** and seek to **identify the factors driving or hindering progress**.

The main users of this evaluation will be ITUC, ATUC, Businessmed, ANND, DG NEAR, DG EMPL and EU delegations of the region.

The **main objectives** of the present evaluation are to provide the implementing partners and the relevant services of the European Union, and the interested stakeholders with:

- An overall independent assessment of the performance of the project “Promotion of social dialogue in the Southern Mediterranean Neighbourhood SOLID II”, paying particular attention to its different levels of results measured against its expected objectives; and the reasons underpinning such results.
- Assessment of the effectiveness of activities in fostering institutionalized social dialogue in the six target countries.
- Assessment of achievement and quality of results, including:
 1. Improving the socio-political environment for social dialogue among key actors (trade unions, employer associations, and governments).
 2. Promoting civic and multi-stakeholder dialogue on key issues, such as employment, workers' rights, gender equality, and inclusive economic policies.
 3. Building a Community of Practice (CoP) and sharing innovative social dialogue tools and models regionally.
- Assessment of the socio-economic impact of the project on key beneficiaries, including vulnerable groups and marginalized communities.
- Lessons learned, conclusions and recommendations / strategies for future socio-political and economic interventions aimed at promoting Social Dialogue in the Mediterranean region, with a focus on regional and cross-country aspects.

The evaluation will assess the intervention(s) using the **six standard DAC evaluation criteria**, namely: **relevance, coherence, efficiency, effectiveness, sustainability** and

the Better Regulation Agenda: Better solutions for better results,
https://ec.europa.eu/info/sites/info/files/completing-the-better-regulation-agenda-better-solutions-for-better-results_en.pdf

⁴ Reference is made to the entire results chain, covering outputs, outcomes and impacts. Cfr. Regulation (EU) No 236/2014 “Laying down common rules and procedures for the implementation of the Union's instruments for financing external action” - https://ec.europa.eu/neighbourhood-enlargement/sites/near/files/pdf/finacial_assistance/ipa/2014/236-2014_cir.pdf.

⁵ *The New European Consensus on Development 'Our World, Our Dignity, Our Future'*, Official Journal 30th of June 2017. <http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:C:2017:210:TOC>

early signs of **impact**. In addition, the evaluation will assess the intervention(s) through an **EU specific evaluation criterion**, which is the **EU added value**.

Furthermore, the evaluation team should consider whether **gender equality and women's empowerment**⁶, **environment** and **adaptation to climate change** were mainstreamed; the relevant **SDGs and their interlinkages** were identified; the principle of **Leave No One Behind** and the **Human Rights-Based Approach** was followed during design, and the extent to which they have been reflected in the implementation of the intervention, its governance and monitoring.

3. Scope of Work

The evaluation will cover the entire duration and the entire geographic scope of the SOLID II project, focusing on the following areas:

- Geographic Scope: Morocco, Tunisia, Jordan, Lebanon, Algeria, and Palestine.
- Thematic Scope: Institutionalizing social dialogue, capacity-building activities, the functioning of social partners and associated actors including ESCs, collaboration among stakeholders, the socio-political environment in each country, economic challenges, and the implementation of the SOLID Charter.
- Economic Dimension: Assess the extent to which the project contributed to address key economic issues in the region, including job creation, decent work, and inclusive economic growth.
- Socio-political Dimension: Evaluate the role of social dialogue in fostering stability and reducing socio-political tensions in the region, and how the project aligned with ongoing governance reforms.
- Regional dimension: assess the added-value and the challenges of the regional and multi-country approach implemented under the project, including in the perspective of the project's link to the UfM framework.

4. Methodology

The evaluation will use a holistic and mixed-methods approach, combining qualitative and quantitative methods to assess project outcomes. This includes:

- Desk review of key project documents (reports, action plans, charters, socio-economic assessments, etc.).
- Key informant interviews with project stakeholders (e.g., trade unions, employers, CSOs, ESCs, local authorities, and government representatives) to gather perspectives on socio-political and economic dynamics.

⁶ Read more on Evaluation with gender as a cross-cutting dimension by following this link (outdated, produced at the time of the GAP II): https://europa.eu/capacity4dev/evaluation_guidelines/documents/new-guidance-note-evaluation-gender-cross-cutting-dimension

- Surveys and focus group discussions with beneficiaries and participants of project activities, with attention to vulnerable groups such as youth, women, and refugees.
- Field visits to project areas to review on-ground progress, taking into account both socio-economic and political dimensions where possible.

5. Key Evaluation Questions

The specific Evaluation Questions, as formulated below, are indicative. Following initial consultations and document analysis, and further to the finalisation/reconstruction of the Intervention Logic of the intervention(s) to be evaluated, the evaluation team will propose in their Inception Report a complete and finalised set of Evaluation Questions. This will include an indication of specific judgement criteria and indicators, as well as the relevant data collection sources and tools.

Once agreed through the approval of the Inception Report, the Evaluation Questions will become contractually binding.

1. Is the intervention logic well-constructed and are the indicators well defined? If not, how can they be improved?
2. How are the stakeholders involved in the project? Are some stakeholders more involved than others and why?
3. Are the 6 partner countries benefiting equally from the intervention?
4. How sustainable is the intervention?
5. To what extent has the project delivered on its planned outputs (in terms of quality and quantity)?
6. What have been the outcomes of the project? and to what extent are they sustainable?
7. To what extent is the intervention contributing to EU's priorities for regional cooperation in the Southern Neighbourhood and to the Union for the Mediterranean agenda?
8. How effective has the project been in addressing socio-political and economic challenges in the region?
9. To what extent has SOLID II contributed to fostering institutionalized social dialogue and mitigating instability in the target countries?
10. How well did the project adapt to economic downturns and external challenges such as the COVID-19 pandemic and political unrest?
11. What socio-political and economic barriers hindered or facilitated the progress of the project?
12. What are the long-term socio-economic impacts of the project on the local communities, especially vulnerable populations?
13. Have the modalities of implementation contributed to enhancing EU response and creating synergies between different EU actions (notably between regional and country-based actions)?
14. What were the added-value and challenges of the regional dimension of the project? how could the potential of regional social dialogue be further promoted to contribute to addressing economic changes?
15. What would be recommendations and strategies for further EU support to social dialogue in the region, as a means to achieve more sustainable and inclusive economies? (strategic focus, scope, potential objectives, stakeholders, implementation modalities)

6. Structuring of the Evaluation and Deliverables

The evaluation process will be carried out in three phases:

- Inception phase
- Interim phase:
 - o Desk activities
 - o Field activities
- Synthesis

Inception phase:

Objective: structure the evaluation and clarify the key issues to be addressed

Main activities:

- Initial review of the background documents
- Kick-off session for a shared understanding of the scope, expectations and methodology
- Initial interviews with key stakeholders
- Reconstruction of the intervention logic / theory of change
- Finalisation of the evaluation questions, on the basis of the present TORs and the reconstructed intervention logic
- Finalisation of the evaluation methodology, including judgment criteria and indicators per evaluation questions. The methodology should be gender sensitive and assess if and how intervention has contributed to progress on gender equality.
- Workplan of subsequent phases
- Identification of expected risks and limitation of the methodology, and mitigation measures
- Preparation and presentation of the inception report; revision of the report

Interim phase

Objective: analyse the relevant secondary data and conducting primary research, through desk and field activities:

- In-depth analysis of relevant documents and other secondary sources, to be done systematically and to reflect the methodology as described in the Inception Report.
- Selected remote/face-to-face interviews to support the analysis of secondary data, as relevant.
- Formulation of the preliminary responses to each Evaluation Question, with analysis of their validity and limitations.

- Identification of the issues still to be covered and of the preliminary hypotheses to be tested during primary research.
- Remote presentation of the preliminary findings emerging from the desk review supported by a slide presentation.
- Completion of primary research following the methodology described in the Inception Report.
- Contact, consultation, and involvement of the different stakeholders, throughout the Interim Phase.
- Use of reliable and appropriate sources of information, respecting the rights of individuals to provide information in confidence, and being sensitive to the beliefs and customs of local, social and cultural environments.
- Preparation of the Intermediary Note
- Preparation and discussion of a slide presentation of intermediate/preliminary findings and preliminary conclusions

Synthesis phase

Objectives of the phase: to report on results from the evaluation (final answers to the Evaluation Questions (final findings) and formulate conclusions and recommendations).

Main activities:

- Analysis and synthesis of the evidence and data collected during the previous phases to provide a final answer to the Evaluation Questions.
- Preparation of the Draft Final Report and presentation, supported by slide presentation.
- Preparation of the Final report.

Deliverables

- Inception Report: Outlining the evaluation approach, methodology, and inclusion of socio-political and economic indicators.
- Intermediary note reflecting the findings of the desk and field analysis.
- Draft Evaluation Report: Including preliminary findings and recommendations, with specific sections on socio-political context and economic impact.
- Final Evaluation Report in English : Maximum 25 pages with an executive summary (1-2 pages), key findings, lessons learned, and actionable recommendations for future socio-political and economic engagement in support to social dialogue in the region.

7. Timeline

The evaluation will take place between 20 November 2024 and 25 January 2025. The draft report will be due two weeks after the feedback workshop, and the final report will be

submitted four weeks after receiving comments on the draft. Timely field visits will be conducted where political conditions allow.

8. Budget

The evaluation will be carried out within the pre-approved budget of € 29.500 VAT excluded, with specific allocations for fieldwork personnel, socio-political and economic experts, and related expenses.

9. Management and Reporting

The consultant will report to the SOLID II Project Director, collaborating closely with the project management team and implementing partners (ITUC, ATUC, BUSINESSMED, ANND), and local actors such as ESCs, government representatives, and CSOs in the target countries, as well as the focal points at the European Commission DG NEAR, DG EMPL, and in the EU Delegations.

10. Evaluation criteria

All submitted proposals will be evaluated based on the following criteria to ensure alignment with project objectives and organizational standards:

1. Organization and methodology: 40% score
2. Financial Competitiveness and Value for Money: 30% score
3. Project Timeline and Management: 30% score

Request for information and submission of tenders to Wassim El rifi (wassim.elrifi@ituc-csi.org) no later than **16 November 2024**