**Call for Applications to
Conduct Data-Gathering and Analysis of
the Needs of Civil Society of the Western Balkan countries and Turkey**

This researched is commissioned within the framework of the EU-funded Technical Assistance to Civil Society Organizations (EU TACSO 3) in the Western Balkans and Turkey (www.tacso.eu)

Objectives and purpose of the EU TACSO 3 project:

The main goal of EU TACSO 3 is to strengthen the capacity of civil society organisations (CSOs) to actively take part in the democratic processes and to stimulate an enabling environment for civil society and pluralistic media development.

EU TACSO 3 is a part of the Civil Society Facility (CSF), an EU programme that aims to support CSOs and increase their active participation in public debate, and their influence in the policy and decision-making processes. The project targets Albania, Bosnia and Herzegovina, Kosovo*[1], Montenegro, North Macedonia, Serbia and Turkey.

In its third phase, EU TACSO 3 project's overall technical assistance will particularly focus on activities where a regional approach enables a stronger impact on the civil society development in each of the beneficiary country.

EU TACSO 3 plays a key role in facilitating coherent support to civil society development in the region, and provides services and assistance to its beneficiaries in six main areas:
1. CSOs organisational and operational capacity development
2. Enabling environment for civil society development
3. Communication and visibility of civil society
4. Development and Monitoring of the Civil Society and Media Guidelines
5. Effective relations between EU and CSOs
6. Events management (including the People to People programme)

The project is funded by the European Union and is implemented by the consortium led by GDSI Limited.

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[1] Kosovo (*) - This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ opinion on the Kosovo declaration of independence.

Terms of Reference

General background of this assignment:

A comprehensive needs assessment of civil society in the Western Balkans and Turkey has been planned within the EU TACSO 3 project framework, with threefold purpose:

1. To assess the state of enabling environment and capacities of civil society against the Guidelines for EU support to civil society in Enlargement countries 2014-2020 (EU Civil Society Guidelines) and inform its revision process;
2. To set the base for the design of capacity building programme for civil society in the Western Balkans and Turkey to be conducted within EU TACSO 3 during 2020-2021;
3. To establish and update baseline of the result framework for measuring the impact of the EU TACSO 3 project.

All three above mentioned aspects of the assessment are to be integrated into one report which will include data analysis on enabling environment and capacities of civil society, with summary findings and recommendations on the EU Civil Society Guidelines monitoring efforts and EU TACSO 3 capacity building measures. Findings will be shared with civil society, National Resource Centres (NRCs), EU Delegations (EUDs) and other relevant stakeholders to ensure participatory approach and validation of the results.

The initial desktop phase of the assessment has been conducted in June-July 2019. It has followed the structure of the EU Civil Society Guidelines using desk analysis as a major tool. It presented strong analysis of the enabling environment, for which analysis was more readily available. A report has been produced presenting data analysis, findings and recommendations based on the desk overview.

The second phase to follow is the field research, which will apply additional research instruments. It will serve to provide a more in-depth insight into the state of civil society. Information gathering through field research will be mostly focused on the assessment of capacities of civil society, including organizational, operational and sectorial capacities that are necessary for impactful participation in the democratisation process. It will also help in better understanding of the enabling environment desk findings, putting the focus on the practice and perception of civil society and key stakeholders.

Approach and Scope of Work:

Comprehensive methodologies for data gathering and research have been developed during the previous project phases as well as by other stakeholder, i.e. BCSDN Monitoring Matrix. Based on their lessons-learned, EU TACSO 3 has developed its own data-gathering and research methodology to form the basis for this assessment as well the regional desktop report, which has been prepared in June-July 2019.

The novelty in approach is reflected in the emphasis on qualitative data collection methods. The rationale lies in the fact that many of quantitative data are available directly or through interlocutors and secondary data which has already been integrated into the regional desktop report. This will enable development of a more informed capacity building program design within the mandate of EU TACSO 3 and improved EU Civil Society Guidelines monitoring process and its review process.

The approach is pragmatic, building on the already available information (esp. those gathered by NRCs), and combining approaches and methods that could save time and resources. This approach will also present a pilot/test of the new methods, which will serve as a step forward to the development of a new and systematic methodology to be used in the next cycle of the EU Civil Society Guidelines monitoring. Building on the experience and lessons learned throughout this pilot phase, an extended methodology might be developed during 2020, which will integrate all research methods proven effective (e.g. desk, survey, interviews, focus groups), to be applied in the following analytical report on the state of civil society against the EU Civil Society Guidelines objectives and benchmarks.

Concretely, the new data-gathering methods include: in-depth interviews with various stakeholders, particularly those involved with enabling environment and capacity building for more effective work of civil society; focus groups with civil society, with particular focus on the areas of special importance such as CSO networks, EU thematic flagship initiatives, grassroots (including informal groups), and gender issues.

1. DATA-GATHERING

Desk analysis: it will serve to update the desk overview that has already been developed, upgrade it with new information if any, and complete primarily the picture on the state of enabling environment looking at the relevant documents (e.g. pending analysis by the NRCs). Also, as it relates to the overall picture of civil society (number of CSOs, target groups, areas of work etc.), the use of free access to information and secondary data could be useful. Hence, the desktop is to provide an overall picture on the state of enabling environment and capacity of civil society.

In-depth Interviews: will serve to get the perspective of relevant stakeholders on the state of enabling environment, collect the information on useful secondary data, and also get their insight into the capacity needs of civil society. There are several groups of interlocutors that would be interviewed in the seven countries:
✓ NRCs and other organisations providing capacity-building and technical assistance to civil society;
✓ CSOs and CSO policy networks dealing with enabling environment for civil society;
✓ CSOs, think-thanks, donors, state institutions conducting similar analysis;
✓ EUDs;
✓ Donors investing in civil society capacity development;
✓ Media sector representatives to feed in the public perception and image of CSOs.

There will be approximately 10 – 15 interviews per country. The interviews will deepen the findings on enabling environment, and also help in identifying key gaps and needs for capacity building of civil society. Except from collecting the inputs on capacity-building needs, these interviews (particularly those with capacity-building providers) will serve to inform EU TACSO 3 on the existing capacity-building assistance, avoiding overlapping and create synergies.

Focus Groups: will primarily serve to provide an in-depth insight into capacity building needs of civil society. The desk research and particularly the interviews will help in identifying key issues to be addresses through focus groups, especially when it comes to organisational capacities. They will also include some of priority areas that have already been identified such as: EU thematic flagship initiatives; networks. With this in mind, there might be special focus groups organised with networks to identify their specific needs (as there is a special program line within EU TACSO 3 for them), and

with women's organizations to identify gender-specific issues (in any case, gender issues will be on the agenda of focus groups as a cross-cutting theme).

In order to reach grassroots and community level, at least one specific focus group will be organised in every country in order to recognize their needs. Focus groups will, to a smaller extent, serve also to check the findings on the enabling environment brining in the cases from practice and recommendations when it comes to legal, financial and CSO-government cooperation framework. There will be 3 - 5 focus groups per country. Preferably, as many as possible focus groups should be held outside of the capital city. If for logistical and time reasons it is easier to organize them in the capital, it is key to ensure that the majority of participants come from CSOs or informal groups/grass-root organization working in the regions and areas outside of the capital.

EU TACSO 3 assessment methodology (i.e. Methodological guide) and detailed EU Civil Society Guidelines framework) will form the basis of the data-gathering methodology to be used by the expert team. The team will be required to updated it to serve the specific purpose of a focus on capacity-building aspect of the assessment, and focus on practical aspects of the enabling environment and relating recommendations.

If emerged through the process, several case studies might be produced as a follow up of the assessment process. This is to be decided at the later stage in consultations between the experts, EU TACSO 3 team and the DG NEAR.

Instrument	Primary purpose	Indicative timeline
Desk analysis	Update the desk overview on enabling environment; Collect quantitative data on civil society.	October 1-15
Interviews	Have the attitudes of key stakeholders included in the assessment of enabling environment; Identify capacity-building needs of civil society and key issues to be covered through focus groups; Get secondary information sources;	October 10 - 25
Focus Groups	Identify capacity-building needs of civil society; Collect attitudes and needs on enabling environment, particularly of grassroot and small organizations.	October 20 – 30

The engagement of NRCs will be crucial, to make sure that already existing analysis done by them or other country-based CSOs are included. Since they are a natural resource for the information on capacity-building needs, they will be consulted in the process of selecting and mobilising interlocutors for interviews and CSOs for focus groups. Given the pragmatic approach of the needs assessment, the involvement of NRCs is also critical to make sure avoiding overlapping and creating synergies in planning the EU TACSO 3 capacity building program.

2. SYNTHESIS AND PREPARATION OF A REGIONAL REPORT
Once the relevant data is gathered for each country and under each instrument, the expert team will proceed to analysis and synthesis of data on the country level based on the provided format for data-set entry against the EU Civil Society Guidelines as well as synthesis in given report format provided by the EU TACSO 3 team.

The findings and provisional recommendations following the needs assessment will be presented at specially organised in-country workshops to ensure the involvement of CSO representatives and other stakeholders in the development of final project and capacity building and institutional development programme and targets. This participatory approach will ensure the local ownership of all development initiatives to be undertaken by EU TACSO 3 with regards to CSOs' capacities.

The input from the workshop will serve to finalize the final report to be delivered to the EU TACSO 3 team.

Key outputs of the assignment:
- A consolidated report on the state of enabling environment and capacity of civil society in the Western Balkans and Turkey;
- Executive regional overview of conclusions and recommendations;
- Data-sets against the EU Civil Society Guidelines;
- Power Point presentation with summary preliminary findings.

For all outputs, formats will be provided by EU TACSO 3 team.

Timing of the activities:
The assignment should be carried out from **October 2019** until **mid-November 2019**, whereby the data-gathering phase would take place in the course of October 2019 and the synthesis and analysis in early November 2019.

Task management: The team of experts (Lead Expert) will report to the EU TACSO 3 Team Leader, EU TACSO 3 Capacity Building Expert and GDSI Project Director.

Expertise requirements:
The group of experts should consist of one Lead Expert (senior expert) and country researchers that are together able to cover the data-gathering and analysis in all seven countries. It is expected that the Lead Expert will be responsible for: coordination of work with EU TACSO 3 team, including adjustment of methodology and data collection tools, coordinating the team of field researchers, conducting data analysis, synthesis and reporting.

Lead Expert:
Qualification and skills:
- University degree in social sciences, public administration, non-profit management, education, law, political science, international relations, EU studies or equivalent;
- Excellent research skills, including data collection, analytical, writing and communication skills;
- Fluency in English is required and knowledge of any local languages of Western Balkan countries and Turkey is considered an advantage.

General experience:
- At least 10 years of professional experience preferably in the field of civil society development/ management;
- At least 5 years of experience related to the issues of civil society needs assessment and enabling environment;

- Experience in research on civil society needs assessment and enabling environment in Western Balkans and Turkey and/or EU (new) Member States is considered a distinct advantage;
- Strong knowledge of the objectives of the EU Enlargement and EU Civil Society Guidelines is considered an advantage.

Specific experience:
- At least 5 years of practical experience in the development of research methodologies for data collection and analysis;
- At least 5 years of practical experience in producing research publications in English (list of publications with links, if available, is required in the CV);
- Experience of working with/in Western Balkan countries and Turkey is an advantage.
- Proven advanced knowledge on the Western Balkans and Turkey civil society landscape;
- Familiarity with civil society capacity building approaches and initiatives.

Field researchers:
Qualifications and skills:
- University degree in social sciences, public administration, non-profit management, education, law, political science, international relations, EU studies or equivalent;
- Excellent analytical, research, presentation and communication skills;
- Fluency in English and local languages of Western Balkan countries and Turkey is required (the field researchers CV in total should be able to prove they are able to conduct focus groups and interviews in all local languages).

General professional experience:
- At least 3, preferably 5 years of professional experience, preferably in the area of civil society;
- At least 3 years of experience related to the issues of civil society capacities and/or enabling environment and/or conducting data-gathering and analysis;
- Experience in research on civil society needs assessment and enabling environment in Western Balkan countries and Turkey and/or EU (new) Member States is considered a distinct advantage;
- Strong knowledge of the objectives of the EU Enlargement and EU Civil Society Guidelines is considered an advantage.

Specific professional experience:
- At least 3 years of practical experience in the development of research methodologies for data collection and analysis;
- At least 3 years of practical experience in producing or participating in development of research publications in English (list of publications with links, if available, is required in the CV).
- Experience of working with/in Western Balkan countries and Turkey is an advantage.
- Proven advanced knowledge on the Western Balkans and Turkey civil society landscape;
- Familiarity with civil society capacity building approaches and initiatives.

Language requirements:
The primary language of the assignment is English. All written outputs shall be provided in English. Field research instruments and data-gathering will be conducted in local languages of the Western Balkan countries and Turkey.

Expressing interest:

Interested experts and entities are invited to apply to express their interest by writing to: welcome@tacso.eu with the following information:

TECHNICAL PROPOSAL:
1. RATIONALE: Any comments you have on the description of the assignment for the successful execution of activities, in particular regarding the objective and purpose, thus demonstrating the degree of understanding of the assignment. An explanation of the risks and assumptions affecting the execution of the assignment;
2. STRATEGY: An outline of the approach proposed for the assignment implementation. A list of the proposed tasks considered necessary to achieve the objectives, their sequence, duration, proposed inputs, and outputs to be produced;
3. EXPERT(S): Profile(s) and CV of expert(s) proposed for the implementation of the assignment. Justification for engagement of proposed expert(s);
4. TIMETABLE OF WORK: The detailed timing, sequence and duration of the proposed tasks, taking into account travel time. The identification and timing of major milestones in executing the assignment. The expected number of working days required;
5. BACKSTOPPING: A short description of the support facilities (back-stopping) that the contractor will provide to the team of experts during the execution of the assignment;
6. PRESENTATION of individuals'/experts' and/or entity's experience on similar assignments;
7. PROOF of previous similar work.

FINANCIAL PROPOSAL:
1. ITEMISED BUDGET requested for this assignment.

Application evaluation

The selection of the Contractor for this assignment will be done in accordance with the Quality and Cost Based selection method, in line with the following points:

Criteria, sub-criteria, and point system for the evaluation of the applications   Points

1. Rationale   10
2. Strategy   30
3. Expert(s)   30
4. Timetable   10
5. Backstopping   5
6. Specific experience of the consultant relevant to the assignment   15

The weights given to the technical and financial proposal of the application are:

Technical proposal = 0.8 and Financial proposal = 0.2

No subcontracting is allowed in the implementation of this assignment.
Successful applicants will be invited for contract negotiation.

Eligible costs

Eligible costs to be presented in the itemized budget include:

- Expert fees (all inclusive);
- Transport costs for interviews and focus groups;
- Refreshments for the focus groups;
- Logistical support costs;
- Currency exchange if required;
- Bank charges.

Deadline

Interested organisations can request clarifications on this assignment by writing to the above address up to **Friday, September 13, 2019 before 17:00 CET**.

The deadline for submitting the applications is **Wednesday, September 18, 2019** by 17:00 CET by e-mail to welcome@tacso.eu.