

Terms of reference (ToRs) for the procurement of services below the EU threshold

Country-wide Representative Survey Measuring Public Perceptions on the Territorial and Administrative Reform in Armenia (TARA)	Project number/ cost centre: 19.2204.6-008.00
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0. List of abbreviations

AG	Commissioning party
AN	Contractor
AVB	General Terms and Conditions of Contract for supplying services and work
FK	Expert
FKT	Expert days
KZFK	Short-term expert
ToRs	Terms of reference

1. Context

The “Good Governance for Local Development South Caucasus” (GGLD) Programme advises and supports respective partner organisations at national, regional (sub-national) and local levels in Armenia, Georgia, and Azerbaijan in the implementation of cooperation initiatives towards improved local governance. It supports the improvement of frame conditions, addresses regional (sub-national) governance issues and works towards the improvement of municipal services and citizens’ participation at municipal level. In the context of the German international cooperation approach, the Programme’s objectives are oriented within the framework of the Caucasus Initiative; thus, the improved professional exchange among the countries of the South Caucasus and their increasing cooperation are also objectives at the regional South Caucasus level.

The Programme is implemented on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ) and in Armenia co-financed by the Swiss Agency for Development and Cooperation (SDC) through its “Improvement of the Local Self-Governance System in Armenia” Programme. It is carried out in close cooperation with the Ministry of Territorial Administration and Infrastructure (MTAI) as the main political partner.

Background

Before the Territorial and Administrative Reform of Armenia (TARA) in 2015, Armenia's municipal landscape was highly fragmented, comprising 915 municipalities with considerable differences in population size and operational capacities. This fragmented structure, combined with limited decentralization, posed significant challenges to the efficiency and effectiveness of local governance. Municipalities often struggled with raising revenues, maintaining infrastructure, providing essential services, and fostering economic development, leading to disparities in service provision and resource allocation.

To address these issues, the Government of the Republic of Armenia initiated the Territorial and Administrative Reform of Armenia (TARA). The overarching goal of TARA was to create a conducive environment for local self-government and to build robust structures at the local level, enabling municipalities to function as responsive and effective units. A key aspect of TARA was the consolidation of the existing municipalities into larger territorial entities. This move was expected to strengthen the administrative capacities of municipalities, facilitating more efficient and effective operations, citizen-centric service delivery, and increased public trust in state institutions. The reform covered various policy areas, including municipal planning, governance, human resources, local economic development (LED), and resource allocation.

The reform journey began with a preparation and knowledge buildup phase, followed by a pivotal piloting phase during 2015-2016. This phase was critical for testing the consolidation process and gathering initial feedback. By the end of this phase in 2016, the number of municipalities had been reduced to 793, with a further reduction to about 200 targeted by the end of 2018. The consolidation process's full rollout continued, and by the end of 2022, TARA had resulted in a restructured territorial-administrative division featuring 71 municipalities, including 64 consolidated and 7 single entities. This structural change was complemented by fiscal policy reforms aimed at enhancing governance consistency, effectiveness, and

transparency. The introduction of proportional representation in local councils and indirect representation for mayors marked significant strides toward democratizing local governance.

Instruments like the Municipal Management Information System (MMIS) and Citizen Offices were introduced to centralize public service delivery, the latter operating on a "one-stop-shop" principle. These instruments played a pivotal role in enhancing municipal administration efficiency and effectiveness. Moreover, public participation and engagement in local governance were significantly bolstered through initiatives like SMS polling, which allowed for substantial community input and supported mayors in advocating for additional resources.

To strengthen local infrastructures and stimulate economic development, governmental institutions identified and prioritized investment needs based on local economic potential. This approach fostered local economic development, reactivated community life, and worked towards reducing regional disparities. However, the reform process was not without challenges, such as balancing the interests of the centre and settlements, resistance from mayors and citizens to enlargement, and the need to enhance public confidence and trust. These challenges highlighted the critical need for increased public participation and community engagement.

Post-2018, TARA's focus shifted towards assessing and capitalizing on the results, rethinking regional administrations, supporting capacity development and performance improvement of local authorities, and expanding innovative governance tools. A significant milestone was the recent approval of the "Concept of Decentralization of Powers in the Republic of Armenia". This pivotal document marks a new era in Armenia's journey to enhance local governance and empower communities.

Decentralization promises numerous benefits, crucial for sustainable community development. It enables more responsive, efficient, and tailored governance, as local authorities gain a better understanding of and ability to address specific community needs. Enhanced local autonomy and decision-making power can lead to improved public service delivery, greater civic engagement, and increased accountability. This shift towards a more decentralized governance model is expected to significantly improve the quality of life and accessibility of essential services across the country.

Given the extensive changes brought by TARA, particularly in community consolidation and local government election systems, initiation of decentralization reform, understanding public perception of these reforms is crucial. The survey to be undertaken through this assignment aims to assess the effectiveness of government communication strategies during the reform, evaluate satisfaction with the new governance framework, and identify areas for further improvement. Insights from this survey will be instrumental in determining how well the reform aligned with the needs and expectations of the people and in guiding future policy directions. This understanding is key to ensuring that TARA's objectives of improved governance, efficiency, and citizen engagement are being met, and to inform ongoing efforts in decentralization and governance reform in Armenia.

2. Tasks to be performed by the contractor

This assignment aims to determine public perceptions about TARA across Armenian municipalities through a countrywide representative survey and on specific directions of decentralization and general awareness about policy considerations behind TARA, aiming also to inform future policy decisions.

The contractor is responsible for providing the following services:

Task 1: Development of Representative Survey Methodology

- Develop a comprehensive survey methodology using a stratified sampling approach to ensure broad representativeness. Divide the municipalities into strata based on key characteristics like population size, geographical location, urban vs. rural status, and economic indicators to ensure that each segment of the population is adequately represented in the sample.
- Ensure the methodology captures a picture of the general awareness related to the policy considerations that form the basis for TARA and decentralization.
- Detail the process for filtering out opinions not directly related to TARA, such as general political opinions, ensuring transparency and methodological soundness.
- Prepare survey questions to measure public perceptions, opinions, and attitudes toward TARA and its impact on the LSG sector in Armenia.
- Develop stakeholder-specific questions to gather varied perspectives.
- Design the survey to be unbiased and clear for respondents from diverse backgrounds (geographical regions, rural/urban, across professions, etc.).
- Identify diverse stakeholders (local officials, community leaders, business owners, citizens) for targeted surveys.

Task 2: Countrywide Representative Survey Measuring Public Perceptions on TARA, Decentralization, and Local Self-Governance (LSG)

- Conduct a comprehensive countrywide representative survey to measure public perceptions, opinions, and attitudes toward TARA and its impact on the LSG sector in Armenia.
- Incorporate survey elements specifically designed to assess public perceptions of the specific directions of decentralization and general awareness of TARA's policy intentions.
- Ensure that data collection and sampling techniques maintain high standards of quality and representation, providing a reliable basis for analysis.
- Analyze the survey results to gain in-depth insights into public perceptions, satisfaction levels, and suggestions for improvement concerning both TARA and the broader themes of decentralization and policy awareness. This analysis should highlight differences and commonalities in perceptions among the varied municipalities.

Task 3: Reporting

- Develop a structured report with a clear mechanism for incorporating stakeholder feedback from MTAI, GIZ, and SDC at all stages.
- Integrate infographics and interactive elements into the report.
- Select notable examples from municipalities to serve as case studies. Highlight these cases in the report to demonstrate practical implications of TARA.
- Present the final draft of the report, ensuring clear communication of findings, insights, and recommendations.
- Outline a process for reconciling differing stakeholder opinions during report finalization.
- Dedicate a section of the report to policy recommendations based on survey findings. This should include both short-term actionable items and long-term strategic suggestions.

Certain milestones, as laid out in the table below, are to be achieved during the contract term:

Deliverables		Expert days (up to)	Deadline	Language
Task 1	Detailed survey methodology and planning including objectives, target population, and sampling strategy	25	29.02.2024	Arm
	Survey questions			
Task 2	Survey Implementation	180	31.05.2024	Arm
	Survey Results Analysis and Reporting	42	26.07.2024	Eng and Arm
	Database of the survey			Arm
Task 3	Final report incorporating stakeholder feedback and suggestions	10	15.08.2024	Eng and Arm
	Executive summary or shorter version	6	26.08.2024	Eng and Arm
	Presentation of the final draft report	2	30.08.2024	Eng and Arm
Total		up to 265		

Period of assignment: from Feb. 2024 until Aug. 2024.

The Contractor is obliged to perform the assignment based on this ToR while ensuring close contact and cooperation with GIZ throughout the implementation of the assignment. The Contractor is further required to submit all the deliverables to GIZ. Approval from GIZ is mandatory at each stage before moving on to the next level.

Please note that GIZ security regulations, concerning operations in some areas of Tavush and Gegharkunik, Vayots Dzor, and Syunik provinces, are based on the travel warning issued by the German Federal Foreign Office and will be provided upon request.

3. Concept

In the tender, the tenderer is required to show *how* the objectives defined in Chapter 2 (Tasks to be performed) are to be achieved, if applicable under consideration of further method-related requirements (technical-methodological concept). In addition, the tenderer must describe the project management system for service provision.

Technical-methodological concept

Interpretation of objectives (1.1): The tenderer is required to consider the tasks to be performed with reference to the objectives of the services put out to tender. Following this, the tenderer presents and justifies the explicit interpretation with which it intends to provide the services for which it is responsible.

Strategy (1.2): Presentation of a strategy on how to implement the assignment, including how to achieve a representative sample, and a detailed description of the methodologies to be employed.

Work schedule and time schedule (1.4): The tenderer is required to describe the key **processes** for the services for which it is responsible and create an **work schedule** that describes how the services according to Chapter 2 (Tasks to be performed by the contractor) are to be provided. In particular, the tenderer is required to describe the necessary work steps and present time schedule.

4. Personnel concept

The tenderer is required to provide personnel who are suited to filling the positions described, on the basis of their CVs, the range of tasks involved and the required qualifications.

Team leader (4.1)

Tasks of the team leader

- Overall responsibility for the advisory packages of the contractor (quality and deadlines)
- Coordinating and ensuring communication with GIZ, partners and others involved in the project
- Personnel management, in particular identifying the need for short-term assignments within the available budget, as well as planning and steering assignments and supporting local and international short-term experts
- Regular reporting in accordance with deadlines

Qualifications of the team leader

- Academic degree (MA level or equivalent) in Social Sciences (e.g., Political Science, Sociology, Law, Economics, Public Administration, Geography),

- 10 years of experience in managing projects and/or teams, ideally related to public perception surveys. Experience in multi-disciplinary project management and ability to coordinate complex tasks,
- 5 years of experience in Armenian local governance system and TARA.

Key expert 1: Methodology Developer (4.2)

Qualifications of key expert 1

- Academic degree (MA level or equivalent) in Sociology or a similar subject related to the assignment,
- 10 years of experience in developing comprehensive representative survey methodologies, ideally of societal and/or political nature,
- Proven experience in sampling strategies and techniques for conducting countrywide representative surveys.

Key expert 2: for local self-governance and TARA (4.3)

- Academic degree (MA level or equivalent) in Social Sciences (e.g., Political Science, Sociology, Law, Economics, Public Administration, Geography),
- 10 years of experience in the local self-governance sector, e.g. as a municipal servant and/or in local politics, in a Civil Society Organisation, or related,
- Demonstrated experience in conducting comprehensive reviews and analyses in the field of territorial and administrative reform, a profound understanding of LSGs, local processes, legislation, gender equality, and gender mainstreaming, and experience in conducting thorough reviews and familiarity with the socio-political context of Armenia.

Key expert 3: for survey data analysis and report generation (4.4)

- Academic degree (MA level or equivalent) in Mathematics, Statistics, Sociology, or a similar subject related to the assignment,
- 7 years of experience in analysing results from polls/ surveys, reflecting strong analytical skills to analyse survey results and derive meaningful insights,
- Proven competence in using statistical and qualitative analysis methods, excellent report writing skills, and proficiency in data visualization tools and techniques.

Short-term expert pool with up to 4 members (4.5)

For the technical assessment, an average of the qualifications of all specified members of the expert pool is calculated. Please send a CV for each pool member for the assessment.

Qualifications of the short-term expert pool

- Academic degree (BA level or equivalent) in Mathematics, Statistics, or Social Sciences (e.g., Political Science, Sociology, Law, Economics, Public Administration, Geography),
- 3 years of experience in conducting representative surveys,
- Demonstrated experience of working in Armenian communities outside Yerevan,
- Experience in survey methodologies, field data collection, and basic data analysis.

Composition of team (4.7): The tenderer is required to describe how well the team is balanced.

5. Costing requirements

Assignment of personnel and travel expenses

Specification of inputs

Fee days	Comments
Fees of TL/key expert/short-term expert pool	Expert fee(s), per working day and in total
Travel expenses	Comments
Overnight allowance in country of assignment	Accommodation is reimbursed by 14.000 AMD per night as a lump sum or upon provision of evidence.
Transport	Comments
Travel expenses (train, car)	Travelling by private car is reimbursed with 100 AMD per km as a lump sum or upon provision of evidence-based on the market price of transportation service.
Other costs	Comments
Other costs	Any other expenses essential for implementing the assignment, e.g., costs for materials. Evidence of these expenses must be submitted.

6. Requirements on the format of the tender

The structure of the tender must correspond to the structure of the ToRs. In particular, the detailed structure of the concept (Chapter 3) should be organised in accordance with the positively weighted criteria in the assessment grid (not with zero). The tender must be legible (font size 11 or larger) and clearly formulated. It must be drawn up in English (language).

The complete tender must not exceed 20 pages (excluding CVs). If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment. External content (e.g. links to websites) will also not be considered.

The CVs of the personnel proposed in accordance with Chapter 4 of the ToRs must be submitted using the requirements specified in the ToR. The CVs shall not exceed 10 pages each. They must clearly show the position and job the proposed person held in the reference project and for how long. The CVs can also be submitted in English (language).

Please calculate your financial tender based exactly on the parameters specified in Chapter 5 costing requirements. The contractor is not contractually entitled to use up the days, trips or budgets in full. The number of days, trips and the budgets will be contractually agreed as maximum limits. The specifications for pricing are defined in the price schedule. **The financial proposal must be submitted separately from the technical proposal.**