



# Terms of Reference for the Evaluation of [The MENA Region Initiative as a Model of Nexus Approach and Renewable Energy Technologies Jordan, Tunisia, Lebanon]

Date: [September, 2020]

## 1. General information

### 1.1 Introduction

Under the agreement between the Swedish International Development Cooperation Agency (SIDA) and Royal Scientific Society (No 114/2016), SIDA contributes towards financing the core activities of the MENA Region Initiative As a Model of Nexus Approach and Renewable Energy Technologies (MINARET). The project is being implemented by the Royal Scientific Society / National Energy Research Center (RSS/NERC), International Union for the Conservation of Nature, and Horizon for Green Development.

RSS/NERC is looking for a consultant to conduct an external evaluation for its project – MINARET in order to: (i) appraise the extent to which the project’s objectives have been achieved and (ii) evaluate the overall impact of the project in the intervention areas.

MINARET is a four-year project (February 2017 – August 2021) and is designed to address the unique sustainability challenges and opportunities of the MENA region by increasing local and regional sustainability capacities using the synergies between renewable energy technology and efficiency, water management and food security. The project is aligned with SIDA’s strategy and its goals of environmental improvement, reduced climate impact and increased resilience to environmental impacts, climate change and natural disasters. The project also embraces five of the UN Sustainable Development Goals: SDG 5-Gender equality; SDG 6- Water; SDG 7- Affordable and clean energy; SDG 11-Sustainable cities and communities; and SDG 13- Climate action.

### 1.2 Evaluation object

The four-year project is built with an overall objective: to strengthen regional cooperation within the MENA region through implementing water-energy-food nexus approach integrated with renewable energy technologies at municipal level, aiming at addressing the unique sustainability challenges and opportunities of the MENA region by increasing local and regional sustainability capacities using the synergies between renewable energy technology and efficiency, water management, and food security. to mitigate climate change impacts and combat poverty.

MINARET has *five* specific objectives:

- Objective (1):** to build municipality’s resilience to climate change through renewable energy/energy efficiency technologies, water management techniques and food security approaches.
- Objective (2):** to strengthen institutional capacities of the relevant governmental authorities

involved in the project.

**Objective (3):** to promote inter-municipal regional cooperation to enhance good governance, and equitable dealing with the needs and human rights

**Objective (4):** to reinforce the role of women, youth, marginalized groups in developing and implementing Nexus approach.

**Objective (5):** to develop a MENA dialogue platform focusing on knowledge sharing, education and lessons learnt at national, regional policy levels.

The project is structured in five different components that address progressively the stated objectives; while the first and the last component cover the planning and the dissemination of the results, the core components are concentrated to the activities that include communication, capacity building, and implementation and replication of pilot projects carried on in the municipalities. These components are:

1. Situational Analysis and Needs Assessment
2. Value Chain Mapping, Capacity Building & Training and Awareness
3. Communication
4. Project Implementation
5. Project Scalability & Replicability

Using a local, bottom-up approach, this project is designed to give local stakeholders at municipal level a voice in determining the details of the planning and implementation of the project as applied in their community. It will assist and support authorities, the private sector and civil society in reducing poverty, improving living conditions and empowering local community groups, women, youth and other marginalized groups. It will build capabilities, resiliency, and economic, environmental, social and cultural sustainability around renewable energy, water management and food security for those living in their communities (including citizens, immigrants and refugees). This will be done through developing increased awareness of the benefits of sustainable development, encouraging changed behaviours in sustainable practices, and identifying and supporting opportunities for education, workplace employment and entrepreneurial initiatives.

By integrating municipalities in a regional network, the project aims at tailoring long-term strategies fitting the regional environmental and climate peculiarities to manage natural resources in a sustainable, effective and productive manner. In addition, project activities are meant to trigger a bottom up change in people's habits and to frame a more effective integration of environmental issues, into sectorial and development policies. Such twofold approach (regional and local) endorsed by this project is particularly suitable for the MENA region, where there is huge potential for renewable energy development in the form of solar, wind and biomass energy. Therefore, by covering Jordan, Lebanon and Tunisia this project aims to strengthen regional environmental guidelines and standards and encourage the shift towards renewable energy.

For further information, the intervention proposal is attached as Annex – A.

The intervention logic or theory of change of the intervention may be further elaborated by the evaluator in the inception report, if deemed necessary.

### 1.3 Evaluation rationale

As per the agreement between Sida and RSS/NERC an evaluation of the project is decided to take place in October 2020.

## 2. The assignment

### 2.1 Evaluation purpose: Intended use and intended users

The purposes of the evaluation are:

- i. To help Sida and RSS/NERC to assess progress of the on-going project;
- ii. To serve as an input to the decision on whether the partnership shall continue and if so,
- iii. How a possible phase (Phase II / New project) would be designed to serve the requirements of Swedish Development Cooperation.

The evaluation is to be designed, conducted, and reported to meet the needs of the intended user [represented by the **Royal Scientific Society / National Energy Research Center**], and the tenderer shall elaborate in the tender how this will be ensured during the evaluation process. Other stakeholders that should be kept informed about the evaluation include the implementing partners International Union for the Conservation of Nature and Horizon for Green Development.

### 2.2 Evaluation scope

The evaluation purpose not to review the minutiae of project delivery. Instead this exercise should focus on long term effects and impacts, sustainability nature of project components as well as the development of methodology within MINARET over time, innovation and ways in which MINARET has responded to changes in external circumstances.

The evaluation will be conducted in three targeted countries of MINARET (Jordan, Tunisia, Lebanon) to look more in depth at project components, their relevance, impact and sustainability in coordination with MINARET management. If needed, the scope of the evaluation may be further elaborated by the evaluator in the inception report.

### 2.3 Evaluation objective: Criteria and questions

The objectives of this evaluation are to assess relevance, effectiveness, impact, sustainability and gender equality of MINARET to generate information on the level of achievement of the project's objectives (outputs, outcomes, results, and whenever possible, any evidence of emerging impact), and formulate recommendations as an input to upcoming discussions concerning the preparation of a new project with support from Sida.

The evaluation questions are:

#### **Relevance: Is the project doing the right things?**

- To what extent has the project objectives and design responded to priority issues (does the project address the needs and priorities of the beneficiaries?), and have they continued to do so if/when circumstances have changed?
- Do the intervention results meet the needs of the various groups of stakeholders, including those who are most likely to have their rights violated?

**Effectiveness: Is the project achieving its objectives?**

- To what extent has the project been in achieving the project results, including any differential results across groups?
- Which were the main hindering factors to achieve the objectives of the project?
- During implementation, were there systematic and appropriate efforts to include various groups of stakeholders, including those who are most likely to have their rights violated?
- Has the MINARET monitoring and evaluation (M&E) delivered robust and useful information that could be used to assess progress towards outcomes and contribute to learning?

**Impact: What difference does the intervention make?**

- What are notably the immediate outcomes for the targeted beneficiaries that can be reasonably attributed partially or totally – to the implemented action?
- What are the long-terms prospects in terms of impact?
- Is the project making a difference in the beneficiary communities and how?

Questions are expected to be developed in the tender by the tenderer and further refined during the inception phase of the evaluation

## 5. Evaluation approach and methods

It is expected that the evaluator describes and justifies an appropriate evaluation approach/methodology and methods for data collection in the tender. The evaluation design, methodology and methods for data collection and analysis are expected to be fully developed and presented in the inception report. Given the situation with Covid-19, innovative and flexible approaches/methodologies and methods for remote data collection should be suggested when appropriate and the risk of doing harm managed.

The evaluator is to suggest an approach/methodology that provides credible answers (evidence) to the evaluation questions. Limitations to the chosen approach/methodology and methods shall be made explicit by the evaluator and the consequences of these limitations discussed in the tender. The evaluator shall to the extent possible, present mitigation measures to address them. A clear distinction is to be made between evaluation approach/methodology and methods.

A *gender responsive* approach/methodology, methods, tools and data analysis techniques should be used. All data collected through the evaluation must be disaggregated by sex, age, disability or other relevant factors wherever possible; that is, separately for men, women, boys and girls and other groups, unless there is a specific reason for not disaggregating. Conclusions and recommendations should distinguish factors related to gender and reflect any significant gender differences found in the data to the extent possible.

It is envisaged that the evaluator will travel to 3 destinations (Al-Karak, Jordan – Monastir, Tunisia – Jdaidet El Chouf, Lebanon) to assess MINARET role in three targeted areas. *Security implications of visiting some locations will be taken into consideration prior travel time*, if travel restrictions due to Covid-19 in the region have been lifted by then. It is expected that the evaluator suggests a back-up plan in the tender, and discusses potential effects on the evaluation (process and results).

The evaluator should facilitate the entire evaluation process with careful consideration of how everything that is done will affect the use of the evaluation. It is therefore expected that the evaluators, in their tender, present i) how intended users are to participate in and contribute to the evaluation process

and ii) methodology and methods for data collection that create space for reflection, discussion and learning between the intended users of the evaluation.

Evaluators should take into consideration appropriate measures for collecting data in case where sensitive or confidential issues are addressed, and avoid presenting information that may be harmful to some stakeholder groups.

## 6. Organisation of evaluation management

This evaluation is commissioned by RSS/NERC. The intended users of the evaluation form a steering group, which has contributed to and agreed on the ToR for this evaluation. The steering group is a decision-making body. It will approve the inception report and the final report of the evaluation and evaluate the tenders. The steering group will participate in the start-up meeting of the evaluation, as well as in the debriefing/validation workshop where preliminary findings and conclusions are discussed. [You may choose to have two separate start-up meetings, one with Sida/Embassy and one with the cooperation partner if it better serves your purpose.] The steering group will also participate in a mid-term meeting with the evaluator, to update on the overall progress of the evaluation and the challenges faced.

## 7. Evaluation quality

The evaluation shall conform to OECD/DAC's Quality Standards for Development Evaluation<sup>1</sup>. The evaluators shall use the Sida OECD/DAC Glossary of Key Terms in Evaluation<sup>2</sup> and the OECD/DAC Better Criteria for Better Evaluation<sup>3</sup>. The evaluators shall specify how quality assurance will be handled by them during the evaluation process.

## 8. Time schedule and deliverables

It is expected that a time and work plan is presented in the tender and further detailed in the inception report. The evaluation shall be carried out between **1 October, 2020 and 10 December, 2020**. The timing of any field visits, surveys and interviews need to be settled by the evaluator in dialogue with the main stakeholders during the inception phase.

The table below lists are the key deliverables for the evaluation process. Deadlines for deliverables must be kept in the tender, but alternative deadlines for other deliverables may be suggested by the consultant and negotiated during the inception phase.

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<sup>1</sup> DAC Quality Standards for Development Evaluation, OECD, 2010.

<sup>2</sup> Glossary of Key Terms in Evaluation and Results Based Management, Sida in cooperation with OECD/DAC, 2014.

<b>Deliverables</b>	<b>Participants</b>	<b>Deadlines</b>
1. Start-up meeting	RSS/NERC	1 October 2020
2. Draft inception report followed by inception meeting	Evaluator/s	15 October 2020
3. Final inception report	Evaluator/s	20 October 2020
4. Comments from intended user to evaluator/s	RSS/NERC	27 October
5. Data collection, analysis and report writing	Evaluator/s	28 October – 15 November 2020
6. Debriefing/validation meeting	Evaluator/s – RSS/NERC	17 November 2020
7. Draft evaluation report	Evaluator/s	27 November 2020
8. Comments from intended user to evaluator/s	RSS/NERC	4 December 2020
9. Final evaluation report	Evaluator/s	10 December 2020

**The inception report** will form the basis for the continued evaluation process and shall be approved by RSS/NERC before the evaluation proceeds to implementation. The inception report should be written in English and cover issues and interpretations of evaluation questions, present the evaluation approach/methodology, methods for data collection and analysis as well as the full evaluation design. A clear distinction between the evaluation approach/methodology and methods for data collection shall be made. A specific time and workplan, including number of hours/working days for each evaluator, for the remainder of the evaluation should be presented. The time plan shall allow space for reflection and learning between the intended user of the evaluation.

The final report shall be written in English and be professionally proof read. The final report should have clear structure and follow the report format in Sida Decentralised Evaluation Report Templet (See Annex - B). The executive summary should be maximum 3 pages. The evaluation approach/methodology and methods for data collection used shall be clearly described and explained in detail and a clear distinction between the two shall be made. All limitations to the methodology and methods shall be made explicit and the consequences of these limitations discussed. Findings shall flow logically from the data. Findings shall flow logically from the data, showing a clear line of evidence to support the conclusions. Recommendations should be specific, directed to relevant stakeholders and categorised as a short-term, medium-term and long-term. There report should be no more than 35 pages excluding annexes (including Terms of Reference and Inception Report).

## 9. Evaluation team qualification

The required skills and expertise for the conduction of this evaluation are evaluator competencies in the following fields:

- Extensive and advanced evaluation skills and experience in project monitoring and evaluation in related fields.
- Familiar with quantitative and qualitative evaluation
- Understanding of main concepts of the project.
- Familiar with participatory and partnership approaches, empowerment and institutional capacity building strategies
- Advanced knowledge of English and Arabic language,
- In-depth understanding of the NEXUS approach (water-energy-food)
- Strong technical knowledge of development project cycle management
- Documented Methodological and analytical skills

The evaluators must be independent from the evaluation object and evaluated activities, and have no stake in the outcome of the evaluation.

## 10. Selection criteria

Evaluator selection will be done based on the following criteria:

- Consistency between candidate's application and expectations
- Overall quality of the application (50%)
- Offered price (25%)
- References listed by the candidate (25%)

The estimated budget for the evaluation should include:

- Fees
- Tax and any other relevant cost related to and required for the proper conducting of the evaluation as per all the objectives and requirements detailed in the present ToRs.

## 11. Submission of the proposal

The maximum budget amount available for evaluation is 40,000JOD

The contact person at RSS/NERC is Rula Al-Shaweesh, MINARET Project Manager. The contact person should be consulted if any problems arise during the evaluation process.

Contact details to intended users (sub-partners, Swedish Embassy/Sida, stakeholders etc.) will be provided by the project manager.

The proposals for this evaluation will include two submissions; as electronic files (in Pdf format) with a heading 'Final Evaluation of MINARET Project as follows:

- i. A technical proposal, containing;
  - The understanding of the ToR, the main goals and tasks of this evaluation and of, the proposed methodology, team, detailed timetable, and steps for the evaluation.
  - The CV of the proposed evaluators (education background, expertise and experience in relation with the scope of the evaluation and the geographical location); with a description of why

- experience is relevant to the task and using a matrix indicate how the proposed team complements each other as well as how they correspond to the profile.
- The proposed structure of the final report and

ii. A financial proposal for the provision of the services.

All proposals must be submitted to the following address: [minaret@rss.jo](mailto:minaret@rss.jo) not later than 20 September, 2020, 16:00hrs Amman Time.

iii. Annexes

# The strategies we implement facilitate short and medium-term change to generate long-term impacts

