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

Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

CONFIDENTIAL

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0. List of abbreviations

AI	Artificial Intelligence
BMZ	Federal Ministry for Economic Cooperation and Development
CoG	Center of Government
CoM	(Palestinian) Council of Ministers
COTS	Commercial Off-the-Shelf
EU	European Union
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
GPC	(Palestinian) General Personnel Council
GTC	General Terms and Conditions of Contract for supplying services and work on behalf of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
HR	Human Resources
IT	Information Technology
KOMP	Cost per output monitoring and forecast
LGUs	Local Government Units
LMAs	Line Ministries and Agencies
M&E	Monitoring and Evaluation
MENA	region, acc. to *Overview geographical Regions and Compositions.pdf* and includes State of Palestine as per UN Stats M49 standard
MoFP	(Palestinian) Ministry of Finance and Planning
MoU	Memorandum of Understanding
MTDE	(Palestinian) Ministry of Telecommunications and Digital Economy
NPDR	(Palestinian) National Programme for Development and Reform
PA	Palestinian Authority
PCBS	Palestinian Central Bureau of Statistics
PMO ERO	Executive Reform Office in the Prime Minister's Office
RMO	Risk Management Office
SRF	Strategic Results Framework
ToRs	Terms of reference
WP	Work Package

1. Context

The function of national planning in Palestine was revived in 2024 under the 19th Government through the establishment of the Ministry of Planning and International Cooperation, which later in 2025 was merged into the Ministry of Finance to form the Ministry of Finance and Planning (MoFP). This ended a decade without centralized planning, signalling renewed commitment to policy coherence, strategic planning, and aid coordination.

The Palestinian Authority (PA) adopts the National Programme for Development and Reforms (NPDR), a strategic framework for recovery and reform across sectors, addressing the socio-economic disruptions caused by occupation, conflict, and institutional crises. It aims to restore essential state functions, reinforce resilience, and improve service provision through cross-sectoral initiatives and targeted reforms, particularly in public financial management, governance, service delivery, and economic development.

To implement the NPDR, the Council of Ministers (CoM) mandated MoFP to lead the national planning cycle and the Ministerial Committee on Reform. It also established the Executive Reform Office in the Prime Minister's Office (PMO ERO) to oversee reform delivery, track progress, and address bottlenecks. Together, MoFP and the PMO ERO constitute the institutional core of the reform architecture: MoFP provides strategic planning and donor coordination, while the PMO ERO drives operational delivery and tracking. Their complementary roles are intended to enhance coherence, accountability, and ownership.

This framework is reinforced by the EU–PA Reform Matrix, developed in late 2024, which sets milestone-based reforms in areas such as public financial management, governance, private sector development, and service delivery. It is linked to the EU's €1.6 billion support package for 2025–2027 through PEGASE, with disbursements conditional on verified reform progress. This performance-based model underscores the need for capable national institutions that can transparently manage, monitor, and communicate reform efforts.

To fulfil its mandate, MoFP plays a central role in national development planning, aid coordination, and monitoring and evaluation. Since 2024, it has re-launched the national strategic planning cycle and initiated alignment of sector plans with the NPDR. However, its ability to lead an integrated, results-oriented system of planning and performance monitoring remains constrained.

The "Multi-Donor Action (EU-BMZ) – Strengthening Capacities and Institutional Readiness of Reform Actors in Palestine" co-financed by the European Union (EU) and the Federal Ministry for Economic Cooperation and Development (BMZ) and implemented by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, aims to enhance the institutional capacity, operational effectiveness, and coordination functions of MoFP and PMO ERO as leading entities in national planning and reform management.

The Action will support MoFP in its role as the central coordinating body for national planning by enhancing its capacity to embed data-driven policymaking, ensure coherent approaches across line ministries, and improve coordination across all levels of governance.

A key result under this Action is expected to be the establishment and operationalisation of a comprehensive, data-based national Monitoring and Evaluation (M&E) system, fully integrated into national planning processes. This system will provide the foundation for systematic data collection, analysis, and use to inform strategic planning and guide policy

formulation. It will also enhance internal accountability and cross-sectoral coordination by assessing sectoral and local policy impacts.

The PA has expressed strong political commitment to reforming the national M&E system, as reflected in decisions of the CoM and the active engagement of MoFP. A comprehensive national assessment of the M&E function across Line Ministries and Agencies (LMAs) has been conducted, identifying systemic institutional, technical, and governance weaknesses.

Key challenges include fragmented and administratively focused M&E practices, weak data quality, management, and use, poor indicator quality, limited internal use of evidence, lack of a coherent national results framework, and weak integration of M&E with planning, budgeting, oversight, and accountability functions. MoFP also faces an absence of standardised methodologies and institutionalised roles for M&E functions across line ministries and agencies. In addition, it lacks formalised mechanisms to integrate reform initiatives into strategic and annual planning cycles and to ensure alignment with sectoral budget frameworks.

At the same time, the assessment identified important institutional eagerness and political momentum that can be leveraged for reform. The CoM has endorsed a set of recommendations calling for the institutionalization of M&E and data management, development of a national M&E system framework, revision of the Strategic Results Framework (SRF), professionalization of M&E and data management functions, and stronger integration of M&E into core government decision-making processes.

This assignment aims to operationalize these recommendations through a structured, system-led intervention, contributing to more transparent, evidence-informed planning and enabling closer alignment between policy priorities, reform initiatives, fiscal planning, and performance.

2. Tasks to be performed by the contractor

2.1 Term

The expected term of the contract for services shall be specified in the ‘Special terms and conditions of contract’. The definitive term and service delivery period are set out in the contract award notification.

2.2 Objectives, indicators, work packages, milestones

The contractor shall contribute for achieving the objectives and indicators described in this document. The module objective and indicator as well as the associated output objective and relevant indicator are as follows:

Module objective: The Institutional capacities, operational effectiveness, and coordination functions of national state agencies are strengthened, enabling evidence-based, inclusive, and accountable reform management.

- Module objective indicator: Number of national policies/strategies adjusted based on evidence from the M&E system and inclusive consultations (Baseline 2026: 0; Target 2028: 4)

Output 1: Capacities to vertically and horizontally coordinate national planning based on evidence, citizen-needs and reform-orientation are strengthened.

- Output indicator: 1.1 Digital, data-based national reform M&E system established and operational (Baseline 2026: 0; Target 2028: 1)

The overall objective of the assignment is to design and operationalize a coherent, institutionalized, usable, and digital-ready national M&E system that:

- Supports evidence-based policymaking and decision making
- Strengthens accountability and oversight
- Enables results-based planning and performance-informed budgeting
- Improves data quality, coherence, and use across government institutions
- Enhances transparency and allows public access to results information

The national M&E system shall be anchored in the Strategic Results Framework (SRF) and national policy objectives. Project-level monitoring systems, whether at national, sectoral, or institutional level, shall be aligned with and feed into the national system but shall not constitute its primary organizing structure. The system shall therefore remain results-based rather than project-based.

The assignment adopts an institution-first, system-led approach, in which institutional arrangements, functional roles, processes, methodologies, and governance mechanisms are fully designed, tested, and adopted by the government before the digital system is procured or implemented. This is to reduce the risk of premature digitization of weak processes and ensure sustainability. Accordingly:

- Software development and implementation are explicitly excluded from the scope
- The assignment will produce procurement-ready functional and technical requirements for future digital system
- The assignment includes a work package to support procurement and quality assurance of software implementation by a separate vendor

The contractor is responsible for providing the work packages (WPs) and for achieving the corresponding milestones described below:

WP1. Inception, Alignment, and Mobilization (42 WDs)
WP2. National M&E System Framework and Governance (76 WDs)
WP3. Results and Measurement Architecture (Strategic Results Framework) (80 WDs)
WP4. Institutional and Functional Design for M&E and Data Management (80 WDs)
WP5. Integration with Planning, Budgeting, and Oversight (58 WDs)
WP6. Operationalization and Piloting (126 WDs)
WP7. Capacity Development, Change Management, and Sustainability (124 WDs)
WP8. Digital Requirement Analysis and Procurement-Ready Specifications (74 WDs)

The following provides detailed description of the work packages and corresponding tasks and deliverables.

WP 1: Inception, Alignment, and Mobilization

The purpose of this WP is to establish a clear, agreed upon, and operational foundation for the assignment by:

- Confirming the scope, sequencing, and priorities of the system development and related reform based on the conducted assessment of the national M&E and the endorsed recommendations
- Securing institutional alignment and ownership across key stakeholders, including MoFP, CoG institutions, PCBS, and selected LMAs
- Defining governance, coordination, and decision making arrangements for the assignment
- Translating the national M&E assessment findings into a detailed, realistic, and risk-aware implementation roadmap

To ensure that the assignment proceeds on the basis of a shared understanding of objectives, roles, and expectations, thereby minimizing ambiguity, duplication, and implementation risks, the contractor shall:

- Treat the conducted national M&E assessment and endorsed recommendations as the baseline, avoiding duplication of diagnostic work
- Focus on validation, prioritization, and operationalization of the recommendations
- Ensure early and sustained ownership by key government stakeholders
- Establish clear governance and accountability mechanisms for decision making throughout the assignment
- Adopt a pragmatic and sequenced approach, balancing ambitious development with institutional feasibility
- Identify and proactively manage technical, institutional, and political risks

Key tasks:

1.1. Review and Consolidation of Assessment Findings

a. Review the national M&E assessment report and all associated documents, including:
    i. Key findings across institutional, functional, and data management dimensions
    ii. Endorsed recommendations and reform priorities
b. Map findings and recommendations against the WPs to ensure full coverage of critical reform areas and avoid duplication / omission of key issues
c. Identify reform areas that require early attention and dependencies between reform components (e.g., institutional design, SRF, data systems, etc.)
d. Prepare a concise note highlighting:
    i. Core reform challenges
    ii. Strategic entry points
    iii. Implications for sequencing and implementation

1.2. Targeted Design Assessment

a. Building on the diagnostic findings in the national M&E assessment report, the contractor shall conduct a set of targeted, design-oriented assessments to

collect the operational and institutional information needed for the design of specific outputs. The following targeted assessments shall be conducted:

i. Data and indicator feasibility mapping (input to WP3)
ii. Institutional baseline mapping (input to WP4)
iii. Planning, budgeting, and oversight process validation (input to WP5)
iv. Pilot LMAs readiness assessment (input to WP6)
v. Inventory of digital systems relevant for M&E and data management (input to WP8)

b. The assessments shall not require large-scale field surveys or data collection, but rather be strictly scoped to collect information that is not available from the existing report while required for the deliverables

1.3. Stakeholder Validation and Alignment

a. Drawing on the findings of the review and assessment, Identify and map key stakeholders, including: MoFP (lead partner institution); CoG institutions (e.g., PMO, CoM, and General Secretariat); PCBS; MTDE; Selected LMAs, Oversight and accountability actors (as relevant)
b. Conduct structured consultations (bilateral and/or workshop based) to:
    i. Validate the strategic alignment on the role of M&E in decision making, planning, and budgeting, drawing on the process mapping and feasibility findings (Task 1.2), and document stakeholder positions, commitments, and reservations for incorporation into the risk register and workplan.
    ii. Confirm M&E reform priorities and sequencing
    iii. Identify stakeholder expectations, constraints, and sensitivities
    iv. Ensure institutional responsibilities and reform ownership
c. Document key agreements, divergences, and risks emerging from consultations

1.4. Establishment of Governance and Coordination Arrangements

a. Define the governance structure for the assignment, including:
    i. Steering / oversight arrangements
    ii. Technical working groups or focal points within key institutions
b. Clarify the:
    i. Roles and responsibilities of participating institutions
    ii. Decision making processes and escalation mechanisms
    iii. Reporting lines and communication protocols
c. Establish coordination mechanisms, including:
    i. Regular progress meetings
    ii. Validation workshops at key milestones
    iii. Information sharing arrangements
d. Ensure governance arrangements are:
    i. Practical and aligned with existing institutional structures
    ii. Capable of supporting cross-government coordination

1.5. Detailed Work Planning and Sequencing

a. Translate the validated scope into a detailed workplan, including:
    i. WP sequencing and interdependencies
    ii. Task level breakdown and timelines
    iii. Milestones and deliverable schedule

b. Define critical path activities, and opportunities for parallel implementation of WPs
c. Align the workplan with:
    i. Government planning and budgeting cycles
    ii. Availability of key stakeholders
d. Ensure the workplan reflects:
    i. Realistic timeframes for validation and decision making
    ii. Iterative design and feedback loops (e.g., piloting and refinement)

1.6. Stakeholder Engagement and Communication Planning

a. Develop an effective stakeholder engagement plan, including:
    i. Identification of primary and secondary stakeholders
    ii. Engagement modalities (workshops, technical meetings, bilateral consultations), frequency, and timing
b. Define a communication approach to ensure transparency and buy-in, manage expectations across institutions, and support change management from the outset
c. Identify potential resistance points and strategies to address institutional sensitivities

1.7. Risk Identification and Mitigation Planning

a. Identify key risks across the institutional, technical, political, and operation categories, and assess likelihood and impact of each risk
b. Define practical mitigation measures, including, e.g., sequencing adjustments, governance interventions, targeted stakeholder engagement
c. Establish a risk monitoring approach to be updated over the course of the assignment

WP1 Deliverables	**Delivery period**
D1. Inception Report A comprehensive report establishing the analytical and operational foundation for the assignment. The report shall demonstrate that the contractor has a thorough, evidence-based understanding of the reform context and a credible, government-validated plan for delivering the assignment. It shall include: 1. Confirmed Scope and Objectives - Refined description of the assignment scope, reflecting the contractor's interpretation of the ToR based on assessment findings and stakeholder validation - Clear articulation of assignment objectives and expected outcomes, including the theory of change linking WP outputs to the intended reform in the national M&E system - Identification of critical assumptions underlying the assignment design and the way they will be monitored 2. Synthesis of Assessment Findings (consolidating findings from the review and targeted assessment) - Summary of the existing assessment findings - Targeted Design Assessment Results	6 weeks after the start of the contract

- Integrated synthesis: confirmed and revised assumptions, key design constraints, and implications for WP sequencing and approach 3. Detailed Workplan and Timeline 4. Governance and Coordination Arrangements 5. Stakeholder Engagement and Communication Plan 6. Risk Register and Mitigation Plan D1 shall be accompanied by a cover note summarizing the 3-5 most significant findings from the integrated diagnostic (Part 2 of D1) and their principal implications for system design, for the attention of GIZ and MoFP senior management.	

WP 2: National M&E System Framework and Governance

The purpose of this WP is to design a coherent, unified, and government-wide National M&E System Framework that:

- Defines clearly the purpose, scope, and core functions of the national M&E system
- Establishes institutional roles, mandates, and accountabilities across the CoG, MoFP, PCBS, and LMAs
- Introduces robust governance and coordination mechanisms to enable whole-of-government performance monitoring and data use
- Defines standardized processes and workflows for data collection, validation, analysis, reporting, and use
- Ensures / enables strong linkages to planning, budgeting, oversight, and accountability systems

This WP provides the conceptual and institutional backbone for all technical, operational, and digital design elements in the subsequent WPs.

The contractor shall ensure that the framework:

- Is fit-for-purpose and aligned with national governance structures and decision making practices
- Moves beyond conceptual design to define operationally implementable arrangements
- Balances central coordination with sectoral ownership and accountability
- Promotes data use for decision making, not only reporting compliance
- Is incremental and realistic, allowing phased implementation
- Establishes a foundation for digital systems without being technology-driven
- Embeds accountability, transparency, and citizen facing elements where possible and appropriate

Key tasks:

2.1. Define the Purpose, Scope, and Core Functions of the National M&E System

a. Define the purpose, scope, and core functions of the national M&E system in consultation with MoFP and key stakeholders, ensuring alignment with national governance structures and the findings of WP1.

2.2. Institutional Roles and Responsibilities

a. Facilitate structured workshops with MoFP, CoG institutions, PCBS, and selected LMAs to jointly map institutional roles, identify overlaps and gaps, and co-develop role clarification options.
    i.
b. Define clear mandates and accountabilities for:
    i. Data ownership and stewardship
    ii. Indicator definition and maintenance
    iii. Reporting responsibilities
    iv. Use of M&E outputs in decision making
c. Identify and address:
    i. Overlaps, gaps, and inconsistencies in current mandates
    ii. Required adjustments (institutional, legal, or procedural)
d. Develop role and responsibility matrices (e.g., RACI or equivalent)

2.3. Governance and Coordination Mechanisms

a. Design practical governance and coordination mechanisms (vertical and horizontal), through participatory engagement with MoFP and relevant institutions, to clarify decision-making authority, coordination responsibilities, escalation pathways, and accountability relationships.
b. Ensure governance design is practical, enforceable, and aligned with administrative realities in the Palestinian governmental context
c. Develop a data sharing and open data governance policy – in accordance with the existing relevant policies and frameworks – including:
    i. Interinstitutional data sharing protocols
    ii. Data classification principles (what data can be published and at what level of disaggregation)
    iii. Applicable legal/regulatory references
    iv. Responsibilities for data protection compliance

2.4. Complete M&E and Data Management Processes

a. Develop fit-for-purpose operational process models for core M&E and data management functions, including data production, validation, aggregation, analysis, reporting, use, and feedback loops
b. Define:
    i. Roles and responsibilities at each step of the processes
    ii. Data flows between institutions and systems
    iii. Frequency and timing of processes (aligned with planning and reporting cycles)
c. Identify bottlenecks and inefficiencies in current processes and opportunities for simplification and standardization
d. Ensure process design supports digital implementation and data quality and consistency

2.5. Linkages to Planning, Budgeting, Oversight, and Accountability

a. Define how the M&E system interfaces with:
    i. National and sectoral planning processes

ii. Annual planning and performance reviews
iii. Performance-based budgeting processes
iv. Oversight and accountability mechanisms (e.g., audits, legislative / legislative council reviews, etc.)

b. Clarify how M&E outputs inform decision making, planning, and policymaking
c. Identify required adjustments to existing guidelines and procedures as well as needed institutional roles in using M&E outputs
d. Ensure strong alignment with WP5 (Integration), while providing the conceptual framework in this WP

This task shall be limited to defining the conceptual interfaces between the M&E system and planning, budgeting, and oversight processes, i.e., identifying where linkages must exist and what their purpose is. Definition of integration mechanisms, processes, or products, shall be performed under WP5.

2.6. Drafting and Validation of the National M&E System Framework

a. Consolidate all elements into a coherent framework document, including:
   i. System purpose, scope, and principles
   ii. Institutional arrangements and governance
   iii. Core processes and workflows
b. Conduct technical validation workshops with key stakeholders and iterative revisions based on feedback
c. Support formal endorsement process (as applicable)
d. Ensure the framework is:
   i. Clear, structured, and accessible to both technical and senior officials
   ii. Actionable and aligned with subsequent WPs

2.7. Evaluation Framework

a. Define the Government's approach to commissioning and using evaluations as part of the national M&E system, including:
   i. Typology of evaluations relevant to the national context (e.g., policy evaluations, program evaluations, performance audits)
   ii. Roles and responsibilities for initiating, managing, and assuring quality of evaluations
   iii. Mechanisms for using evaluation findings in planning, budgeting, and policymaking
   iv. Minimum standards for evaluation quality

WP2 Deliverables	**Delivery period**
D2. National M&E System Framework A comprehensive and government-endorsed framework document, including: 1. System Vision and Objectives - Clear articulation of the purpose and strategic objectives of the national M&E system - Definition of scope and coverage 2. Institutional Roles and Governance Arrangements - Detailed description of roles and responsibilities of all key actors - Governance structure and coordination mechanisms - Decision making and accountability arrangements	Draft: 12 weeks after the start of the contract Final: 15 weeks after the start of the contract

3. Core M&E Processes and Workflows - End-to-end M&E and data management process maps - Defined workflows, data flows, and responsibilities - Standard operating principles for system functioning 4. Linkages to Planning, Budgeting, and Accountability - Defined interfaces with planning and budgeting systems - Role of M&E in performance management and decision making - Integration with oversight and accountability mechanisms 5. Evaluation Commissioning and Use - Typology of evaluations - Roles and responsibilities in evaluation - Evaluation mechanisms - Evaluation quality standards 6. Implementation Considerations - Key institutional and operational prerequisites - Dependencies with other WPs (e.g., SRF, institutional design, digital requirement analysis) - Phasing considerations for rollout	

WP 3: Results and Measurement Architecture (Strategic Results Framework)

The purpose of this WP is to redesign the Strategic Results Framework (SRF) and the broader national results measurement architecture to ensure that it is:

- Methodologically sound, based on clear theories of change and results hierarchies
- Coherent across the levels of government, linking national, sectoral, and institutional results
- Measurable and data-driven, with well-defined, feasible, and meaningful indicators
- Usable for decision making, supporting planning, budgeting, and performance management
- Operationally implementable and aligned with institutional capacities and data availability

This WP provides the analytical and measurement backbone of the national M&E system.

The contractor shall ensure that the SRF:

- Moves beyond compliance reporting toward decision informing performance measurement
- Is grounded in realistic data availability and institutional capacity
- Avoids over-complexity and excessive indicator proliferation
- Ensures vertical coherence (from national to sector to LMA)
- Embeds data ownership and accountability
- Supports future digital implementation and interoperability

Key tasks:

3.1. Review of Existing SRF Methodology and Practices

a. Review existing SRF related documentation, including:
    i. Methodological guidelines
    ii. Indicator frameworks at national and sector levels
    iii. Reporting templates and practices
b. Assess:
    i. Clarity and consistency of results hierarchies (outputs, outcomes, impacts)
    ii. Quality and relevance of existing indicators
    iii. Alignment between planning documents and measurement frameworks
c. Identify:
    i. Redundancies, inconsistencies, and gaps
    ii. Overloaded or under-defined indicator sets
    iii. Weaknesses in measurability, attribution, and data availability
d. Prepare a diagnostic note highlighting key methodological and operational issues

3.2. Development of Revised SRF Methodology

a. Develop a standardized SRF methodology, including:
    i. Definition of results hierarchy (inputs, outputs, outcomes, impacts, as appropriate)
    ii. Guidance on developing and documenting theories of change
    iii. Criteria for selecting and validating indicators (SMART, relevance, attribution, etc.)
b. Define:
    i. Standard indicator typologies (output, outcome, impact, proxy indicators, etc.)
    ii. Rules for indicator formulation (definitions, units, baselines, targets)
c. Develop templates and guidance for:
    i. Results frameworks at national, sectoral, and institutional levels
    ii. Indicator reference sheets (metadata)
d. Ensure that the methodology is:
    i. Practical and user-friendly
    ii. Adaptable across sectors

3.3. Harmonization of Results and Indicators Across Levels

a. Conduct structured technical sessions with MoFP, PCBS, and selected LMAs to jointly review, rationalize, and harmonize indicators across national, sectoral, and institutional levels
b. Map and align national-level strategic results, strategies and results, and LMA-level plans and indicators
c. Establish clear vertical linkages, showing the contribution of sectoral and institutional results to national priorities
d. Rationalize indicators by eliminating duplication, consolidating overlapping indicators, and ensuring consistency in definitions and measurement approaches
e. Define a core national indicator set, complemented by sector-specific indicators
f. Ensure that the harmonization supports aggregation and comparability as well as policy-relevant analysis

3.4. Definition of Feeder Data Requirements, Standards, and Ownership

a. Identify feeder data sources for each indicator, including:
   i. Administrative data systems
   ii. Surveys and statistical data (in coordination with PCBS)
b. Propose:
   i. Data collection methods and frequency
   ii. Data validation and quality assurance requirements
c. Develop in consultation with MoFP and PCBS data ownership and stewardship, including responsible institutions for data production, validation, and reporting
d. Develop indicator metadata standards, including definitions, formulas, data sources, and limitations
e. Identify data gaps and risks and propose interim solutions in cases where data is not immediately available

3.5. Alignment with Planning and Reporting Cycles

a. Propose alignment of the SRF with:
   i. National and sectoral planning cycles
   ii. Annual planning and budgeting processes
   iii. Reporting and review cycles
b. Propose:
   i. Timing for indicator updates and reporting
   ii. Integration points with decision making processes
c. Ensure the SRF supports:
   i. Annual and mid-term performance reviews
   ii. Evidence-based adjustments to plans and budgets

3.6. Development, Validation, and Finalization of SRF Outputs

a. Develop:
   i. A revised SRF methodology document
   ii. An operational SRF and indicator framework designed for the next national planning cycle, accompanied by a transitional indicator set for the remaining current cycle to enable piloting under WP6
b. Conduct technical validation workshops with key stakeholders and iterative refinement based on feedback
c. Ensure consistency with WP2 (framework) and WP5 (integration) and practical usability by LMAs and central institutions

WP3 Deliverables		Delivery period
D3.	**Revised SRF Methodology Document** A comprehensive methodological guide, including: - Results hierarchy definitions and theory of change guidance - Indicator selection criteria and typologies - Standard templates for results frameworks - Indicator metadata standards - Practical guidance for application across sectors	16 weeks after the start of the contract
D4.	**Updated SRF and Indicator Framework** A fully revised and operational SRF, including:	20 weeks after the start of the contract

- Harmonized national, sectoral, and LMA-level results frameworks - Consolidated and rationalized indicator set - Defined feeder data sources and ownership - Alignment with current planning and reporting cycles	

WP 4: Institutional and Functional Design for M&E and Data Management

The purpose of this WP is to design practical, implementable institutional and functional arrangements for M&E and data management that:

- Clearly define who performs which functions, at what level, and how
- Establish effective workflows and coordination mechanisms between technical, M&E, and data units
- Provide organizational models suited to the national administrative context
- Define professional roles and competencies required for system operation and sustainability
- Ensure feasibility within existing legal, human resource, and administrative frameworks

This WP translates the conceptual framework (WP2) into operational institutional arrangements.

The contractor shall ensure that the design:

- Is function-driven, not structure-driven (organizational form follows functions)
- Builds on and strengthens existing institutional arrangements where possible
- Avoids over-centralization while ensuring effective coordination and standardization
- Is realistic and implementable within current public administration constraints
- Supports professionalization of M&E and data management functions

Key tasks

4.1. Definition of Core M&E and Data Management Functions

a. Identify and define core functions, including:
   i. Results framework development and maintenance
   ii. Data collection, validation, and management
   iii. Analysis and reporting
   iv. Performance review and feedback
   v. Coordination and quality assurance
b. Distinguish functions across leading (MoFP), central (CoG, PMO, PCBS) and sectoral and institutional (LMAs) levels
c. Clarify which functions must be centralized and which must be decentralized
d. Ensure alignment with the processes defined in WP2 and measurement architecture defined in WP3

4.2. Functional Workflows and Coordination Mechanisms

a. Develop detailed workflows for key functions, including:

i. Data production and validation
ii. Reporting and review processes
iii. Feedback into planning and budgeting

b. Define interfaces between technical units and central M&E / data units as well as coordination mechanisms between LMAs and central institutions
c. Identify potential bottlenecks and duplication risks
d. Ensure workflows are clear, efficient, and aligned with institutional capacities

4.3. Organizational Design Options

a. Facilitate sessions with MoFP, GPC, and selected LMAs to:
   i. Jointly develop and agree on the objectives to be achieved and the criteria for assessing organizational design options
   ii. Test organizational options given the operational realities, legal constraints, and staffing capacities
b. Develop and assess institutional anchoring options for M&E and data management, including but not limited to directorates, functional units, or hybrid institutional arrangements
c. Define options for central-level arrangements and LMA-level structures
d. Asses for each option:
   i. The advantages and limitations
   ii. Resource implications
   iii. Feasibility within the administrative context in Palestine
e. Provide recommended options with justification

4.4. Roles, Responsibilities, and Competency Requirements

a. Define job roles, key responsibilities, and preliminary competency requirements for all M&E and data management positions
b. Ensure clarity in accountability for results and data quality

The output of this task will serve as the primary input to WP7 where a full competency framework shall be developed.

4.5. Legal, Human Resource, and Organizational Feasibility Assessment

a. Review existing legal and regulatory frameworks and civil service, HR, and GPC policies
b. Assess feasibility of proposed arrangements in terms of:
   i. Staffing and recruitment
   ii. Organizational restructuring
   iii. Mandate adjustments
c. Identify required legal or administrative changes and needed transitional arrangements for implementation
d. Engage with relevant authorities to validate feasibility and incorporate their feedback into the design

4.6. Consolidation and Validation of Institutional Design

a. Consolidate all elements into a comprehensive design report
b. Conduct validation workshops with key institutions
c. Refine organizational options and workflows based on feedback
d. Ensure alignment with WP2 (framework) and WP3 (SRF) as well as practical readiness for implementation

WP4 Deliverables	Delivery period
D5. Institutional and Functional Design Report A comprehensive and actionable report, including: 1. Functional Models and Workflows - Defined M&E and data management functions - Detailed workflows and coordination mechanisms 2. Roles and Responsibility Matrices - Clear assignment of responsibilities across institutions - Role definitions and accountability structures 3. Organizational Options and Recommendations - Defined objectives and assessment criteria for options - Assessed organizational design options, with advantages, limitations, and feasibility analysis for each - Recommended options with justification 4. Competency and Staffing Frameworks - Job roles and competency requirements - Linkages to capacity development 5. Feasibility and Implementation Considerations - Legal, Human Resource, and organizational feasibility analysis - Required reforms and transitional steps	22 weeks after the start of the contract

WP 5: Integration with Planning, Budgeting, and Oversight

The purpose of this WP is to define and design the integration elements that embed the national M&E system into core government decision-making processes, ensuring that data and performance information are:

- Systematically used in strategic and annual planning
- Linked to performance-based budgeting and resource allocation
- Integrated into oversight, accountability, and review mechanisms
- Translated into actionable decision support products

This WP aims to ensure that the national M&E system is designed to become a functional management tool, rather than a parallel reporting exercise.

The contractor shall ensure that integration:

- Is practical and enforceable, aligned with existing planning systems and, where possible, public financial management
- Focuses on decision use, not only reporting compliance
- Aligns with budget cycles and institutional incentives
- Avoids overly complex reporting and administrative burdens
- Strengthens accountability and emphasizes performance

Key tasks:

5.1. Integration with Strategic and Annual Planning

a. Map existing planning processes, including:
    i. National development and reform plans
    ii. Sectoral strategies
    iii. Annual operational plans
b. Define how M&E outputs (from the SRF, WP3) inform:
    i. Priority setting and target-setting
    ii. Plan formulation and revision
c. Establish feedback loops from performance data into planning cycles and mechanisms for revising plans based on evidence
d. Define roles of CoG, MoFP, and LMAs in using M&E data for planning decisions

5.2. Integration with Performance-Based Budgeting

a. Facilitate sessions with MoFP and selected LMAs to analyse current budgeting processes and assess how M&E products can be integrated into strategic planning, annual planning, and budgeting cycles
b. Identify practical entry points and phased options for integrating M&E into performance-informed budgeting processes
c. Define roles and responsibilities of MoFP, LMAs, CoG, and oversight bodies
d. Ensure alignment with fiscal realities and administrative feasibility of the Palestinian governmental context

5.3. Review and Update of Planning and Budgeting Guidelines

a. Review existing planning and budget preparation guidelines
b. Identify gaps in:
    i. Planning-budgeting linkage
    ii. Integration of M&E concepts and tools
    iii. Use of performance information
c. Propose updates to:
    i. Embed SRF, indicators, and reporting requirements
    ii. Standardize integration of M&E into planning and budgeting templates
d. Ensure guidelines are clear, concise, and implementable by LMAs

5.4. Definition of Standard Decision Informing Products

a. Define a set of standardized M&E outputs, including:
    i. Performance reports (at needed frequencies)
    ii. Dashboards and scorecards
    iii. Policy briefs and analytical summaries
b. Specify for each product the purpose and target audience, the content and format, and frequency and timing
c. Ensure that products are tailored to decision makers (technical and senior levels) and action-oriented, usable, and concise

5.5. Roles of Oversight and Accountability Actors

a. Map roles of CoG and oversight institutions
b. Define how M&E outputs support performance oversight, accountability, and transparency
c. Define reporting channels and requirements and mechanisms for follow-up on findings and recommendations

5.6. Consolidation and Validation of Integration Framework

a. Consolidate all integration elements into a coherent framework
b. Conduct validation with MoFP, CoG, and key LMAs
c. Refine based on feedback and ensure alignment with WP2 (system framework), WP3 (SRF), and WP4 (institutional arrangements)

WP5 Deliverables		Delivery period
D6.	**M&E Integration Framework** A comprehensive framework document, including: 1. Integration with planning processes 2. Integration with performance-based budgeting 3. Linkages to oversight and accountability mechanisms 4. Defined roles and responsibilities 5. Standard decision making products	24 weeks after the start of the contract
D7.	**Updated Planning and Budgeting Guidance Notes** Revised and practical guidance documents, including: 1. Updated planning templates and instructions 2. Integration of SRF and performance indicators 3. Budgeting guidance incorporating performance considerations 4. Clear instructions for LMAs	26 weeks after the start of the contract

WP 6: Operationalization and Piloting

The purpose of this WP is to translate system designs into practical, user-ready tools and processes, and to test and validate them through piloting in selected LMAs to ensure:

- Feasibility and usability in real institutional settings
- Identification of practical challenges and bottlenecks
- Iterative refinement of system components prior to full rollout

The contractor shall ensure that:

- Tools and processes are simple, clear, and user-oriented
- Piloting is representative and manageable
- Testing focuses on real workflows and decision use
- Feedback is systematically captured and translated into improvements

Piloting shall cover a minimum of 3 and maximum of 5 LMAs, selected to represent different sectoral contexts and institutional capacities.

Key tasks:

6.1. Development of SOPs, Manuals, and Toolkits

a. Develop Standard Operating Procedures (SOPs) for:
    i. Data collection and validation
    ii. Reporting and analysis
    iii. Performance review processes
b. Develop supporting materials, including:

i. User manuals
ii. Templates (reporting, indicator tracking, dashboards)
iii. Practical toolkits for LMAs

c. Develop interim tools:
   i. Define a set of minimum viable interim digital tools (e.g., structured Excel-based templates, shared drives, etc.) that can be deployed during the period from system operationalization until complete digital platform implementation
   ii. Ensure the defined tools are suitable for partner's IT capabilities and requirements (know-how, licensing, data protection, etc.) in consultation with MoFP and MTDE
   iii. Specify governance and data migration considerations to ensure continuity between the interim and final digital environments
d. Ensure materials are clear, concise, and role-specific and aligned with the outputs of WP2-WP5

6.2. Selection of Pilot LMAs and Pilot Design

a. Define criteria for selecting pilot LMAs
b. Select pilot LMAs in coordination with MoFP
c. Define pilot scope implementation plan, and timeline
d. Establish roles and responsibilities for pilot implementation

6.3. Pilot Implementation Support

a. Support operational piloting using existing, manual, or lightweight interim tools as appropriate
   i. Support LMAs in applying the SOPs and tools, and adapt these based on operational feedback from LMA staff
b. Facilitate hands-on coaching and troubleshooting to support LMAs in the pilot
c. Ensure pilots use simple digital tools (as appropriate) and are not dependent on a complete IT platform

6.4. Feedback Collection and Learning

a. Conduct structured reflection sessions with pilot LMAs to review implementation experience, identify bottlenecks, and co-produce practical refinements
b. Assess based on the pilot:
   i. The usability of tools
   ii. Institutional capacity constraints
   iii. Data availability and quality issues
c. Document lessons learned as well as good practices and challenges

6.5. System Refinement

a. Refine SOPs, tools, and templates as well as processes and workflows
b. Address identified bottlenecks and inefficiencies
c. Ensure refinements are practical and scalable across government and adherent to the framework principles

WP6 Deliverables	**Delivery period**
D8. Operational SOPs and Toolkits A complete set of operational materials, including: 1. SOPs for all core M&E processes	30 weeks after the start of the contract

	2. User manuals and guidance documents 3. Templates and toolkits for LMAs 4. Interim tools	
D9.	**Pilot Implementation Report** A comprehensive report, including: 1. Description of pilot scope and implementation 2. Assessment of system usability and feasibility 3. Lessons learned and identified challenges 4. Recommended refinements to system design	36 weeks after the start of the contract

WP 7: Capacity Development, Change Management, and Sustainability

The purpose of this WP is to ensure the long-term sustainability and institutionalization of the M&E system by:

- Building professional competencies in M&E and data management across central institutions and LMAs
- Supporting behavioural and organizational change required for M&E to become an integral function rather than a compliance requirement
- Establishing career pathways, incentives, and professional development infrastructure that sustain M&E capacity beyond the assignment
- Equipping designated government institutions with the capability to maintain, update, and evolve the system independently after assignment conclusion

The contractor shall ensure that:

- Capacity development is practical, role-specific, and grounded in the actual system design produced through WP2-WP6
- - Training is co-designed and co-delivered with government counterparts from the outset, building internal training capability alongside operational capacity
- Change management addresses institutional culture and incentives
- Sustainability is embedded through institutional systems, formal civil service structures, and documented stewardship arrangements, and not through one-off trainings
- System stewardship capacity, i.e., partners' capacity to maintain, update, and calibrate the system over time, is treated as a distinct, important objective alongside operational capacity

Key tasks:

7.1. Competency Framework Development

a. Building on the role definitions, RACI matrices, and organizational models produced under WP4, define a comprehensive National M&E and Data Management Competency Framework covering all M&E and data management roles across MoFP, PCBS, MTDE, and LMAs
b. Specify for each role:
    i. Role-specific technical and behavioural competencies reflecting the distinct functions (SRF, M&E, etc.)

ii. System stewardship competencies for designated MoFP staff and LMA roles

c. Ensure full alignment between the competency framework and the institutional roles defined in WP4 and GPC frameworks

7.2. Training and Professional Development Design and Delivery

a. Design a structured training and professional development program covering all competency areas defined in Task 7.1.
b. Develop structured, high-quality training materials and curricula for all training pathways, produced in English and Arabic and designed for possible delivery by government trainers
c. Define and apply appropriate delivery modalities for each training pathway, including facilitated workshops, on-the-job coaching during WP6 piloting, and self-paced learning using the tools developed under Task 7.5
d. Deliver training in two rounds aligned with the WP6 piloting schedule and system rollout:
    i. Round 1: M&E and data management staff in central institutions and pilot LMAs
    ii. Round 2: LMA focal points across a broader set of institutions, extending coverage beyond the pilot
e. Establish a training-of-trainers program for government staff primarily from MoFP, PCBS, and chosen pilot LMAs, to deliver core training modules independently

7.3. Change Management and Communication Strategy

a. Develop a comprehensive change management strategy based on the stakeholder analysis and resistance mapping conducted during WP1 and updated through WP4 institutional engagement
b. Design and implement communication plans and messaging covering internal government communication and external communication (positioning the national M&E system as a transparency commitment and supporting the public results portal design under WP8)
c. Identify resistance points and implement targeted mitigation strategies, distinguishing between capacity-based, incentive-based, and political drivers of resistance

7.4. Institutionalization and Incentives

a. Propose concrete mechanisms to institutionalize M&E and data management as permanent functions within the Palestinian civil service
b. Design career tracks and professional progression pathways for M&E and data management roles
c. Define incentive structures for performance and data use, addressing both individual and institutional levels
d. Ensure full alignment of all institutionalization and incentive proposals with GPC regulations and civil service law

7.5. System Stewardship and Continuous Development Capacity

This task aims to build the institutional capability required to maintain, update, and continually improve the national M&E system after the assignment concludes. Distinct from the operational capacity developed in Tasks 7.1-7.4 (system use), this task focuses on the capability of the partners to adapt and

evolve the system in response to changing institutional needs, planning cycles, data environments, and operational experience.

a. System update protocols and decision framework: Develop comprehensive operational procedures governing how each component of the national M&E system is reviewed and updated over time, including:
   i. SRF indicator sets, results chain logic, and target values
   ii. Data source specifications and indicator metadata
   iii. SOPs and operational toolkits when workflows change
   iv. RACI matrices, role definitions, and coordination mechanisms
   v. Interim digital tools, including templates, data collection instruments, and user guides

b. Maintenance and further development training for system administrators: Deliver hands-on, scenario-based training to the designated MoFP M&E team and relevant PCBS and LMA focal points covering the practical execution of system update procedures.

c. Produce a comprehensive system documentation package in English and Arabic, enabling qualified MoFP and LMA staff to understand, use, update, and troubleshoot all system components independently. The package shall consolidate and operationalize the key outputs of WP2-WP7 into a coherent reference system, including operational derivatives of design documents, an indicator registry, a version-controlled SOP library, and the update protocols produced under sub-task (a)

WP7 Deliverables	**Delivery period**
D10. Capacity Development and Change Management Strategy A comprehensive strategy document establishing the framework and approach for all capacity development and change management activities under WP7. The document covers: 1. Situational analysis 2. Strategic approach to capacity development 3. Change management strategy 4. Sustainability measures 5. Implementation roadmap	32 weeks after the start of the contract
D11. Competency Frameworks and Training Roadmap A consolidated professional development framework covering all M&E and data management roles defined in WP4, structured to support both immediate operational capacity development and long-term professional institutionalization within the Palestinian civil service. The deliverable comprises: 1. National M&E and Data Management Competency Framework 2. Roadmap for Training and Development -	32 weeks after the start of the contract
D12. Training Modules and Materials A complete, government-maintained library of training content covering all capacity development activities under WP7, produced in English and Arabic and organized to allow independent use by government trainers after assignment conclusion. The library comprises:	36 weeks after the start of the contract

	1. Operational training modules for M&E and data management practice 2. System stewardship training materials 3. Training-of-trainers program materials 4. Training administration package 5. Record of the training under Task 7.2(d) including names, institutional affiliations, and modules	
D13.	**System Stewardship Package** A comprehensive operational package equipping MoFP and designated government institutions to maintain, update, and evolve the national M&E system independently after assignment conclusion. The package comprises: 1. System update protocols and decision framework 2. System documentation package 3. Stewardship training record: Documentation of stewardship training delivered under Task 7.5(b) and 7.5(c) to designated MoFP, PCBS, and LMA staff, including participants, content covered, competencies assessed, and outcomes - Record of the training-of-trainers program, including names, institutional affiliations, and modules	38 weeks after the start of the contract
D14.	**System Handover and Transition Protocol** A document governing the transition of all system ownership, documentation, and operational responsibility from the contractor to the Palestinian Authority at assignment conclusion. The protocol shall include: 1. **A** handover checklist confirming that all system components are operational, documented, and transferred 2. A statement of system readiness signed by MoFP confirming acceptance of operational responsibility **3.** A list of outstanding issues or incomplete elements with recommended resolution approaches	40 weeks after the start of the contract

WP 8: Digital Requirement Analysis and Procurement-Ready Specifications

The purpose of this WP is to conduct a comprehensive requirement analysis of the national M&E system, ensuring that technology solutions are fully aligned with institutional arrangements, business processes, and data governance frameworks defined in preceding WPs.

This WP will support MoFP in making informed, evidence-based technology acquisition decisions by conducting assessment of implementation options (e.g., configurable commercial platforms, bespoke development, or hybrid approach), without engaging in software development or vendor selection.

The contractor shall:

- Ensure that technology design follows institutional and functional design
- Maintain strict vendor neutrality and avoid promoting specific proprietary solutions

- Focus on long-term sustainability, interoperability, and Government ownership
- Produce procurement-ready outputs, enabling a separate IT implementation process
- Assess the appropriate and realistic role of emerging technologies (including AI) based on system readiness and data maturity

Key tasks:

8.1. Functional Requirements Definition

a. Consolidate and translate outputs from WPs 2-6 into detailed functional requirements for the M&E and data management system
b. Define system functionalities over the full M&E cycle, including:
    i. Strategic and annual planning support
    ii. Indicator definition and management
    iii. Data collection, validation, and storage
    iv. Data analysis and visualization
    v. Reporting and decision-support tools and products
    vi. Evaluation tracking and knowledge management
c. Define user roles, access levels, and workflows based on the institutional design (WP4)
d. Identify priority use cases and user journeys (e.g., CoG agencies, LMAs, oversight bodies)

8.2. Data Architecture and Interoperability Design

a. Define the logical data architecture for the M&E system, including:
    i. Data sources (administrative, statistical, survey-based)
    ii. Dataflows between institutions
    iii. Data ownership and stewardship
b. Specify interoperability requirements with existing systems (e.g., planning, budgeting, statistical systems)
c. Define data standards, metadata requirements, and data quality assurance mechanisms
d. Ensure alignment with national data governance and interoperability frameworks (WP5)

8.3. Technology and Market Landscape Scan

a. Conduct a high-level research of the technology landscape relevant to M&E and public sector performance management systems
b. Identify typical categories of solutions (e.g., results frameworks platforms, data integration tools, dashboards, knowledge management systems)
c. Summarize common capabilities, strengths, and limitations of available solution types
d. Provide indicative examples for illustration, without endorsing specific vendors
e. Identify key trends in public sector M&E digitalization relevant to the Palestinian context

8.4. Assessment of Technology Options and Implementation Modalities

a. Conduct a structured, vendor-neutral assessment of technology implementation options, including:
    i. Configurable commercial off-the-shelf (COTS) platforms
    ii. Bespoke/custom-built solutions
    iii. Hybrid approaches (e.g., COTS core with customized modules)
    iv. Low-code / no-code platforms if and where relevant
b. Assess each option against defined criteria, including:
    i. Functional fit with M&E system requirements
    ii. Customization needs and implications
    iii. Total cost of ownership (including licensing, maintenance, upgrades)
    iv. Integration complexity and interoperability
    v. Scalability and flexibility
    vi. Sustainability (skills availability, vendor dependence, lock-in risks)
    vii. Alignment with government digital policies and infrastructure
c. Develop a decision support framework, including:
    i. Comparative analysis matrix
    ii. Key trade-offs and risks
    iii. Conditions under which each option would be appropriate
d. Provide recommended implementation scenarios (e.g., preferred options under specific conditions)

8.5. Assessment of targeted use cases for emerging technologies (including AI)

a. Identify and assess potential use cases for emerging technologies (including AI) relevant to data quality, analytics, reporting, and decision support within the M&E system, considering the specific data maturity, institutional capacity, and governance context in Palestine
b. Assess feasibility and readiness conditions, including:
    i. Data availability, quality, and structure
    ii. Institutional capacity and digital maturity
    iii. Governance and ethical considerations (e.g., transparency, bias, etc.)
c. Provide clear distinction between:
    i. Near-term feasible applications
    ii. Medium-term opportunities
    iii. Not recommended or high-risk uses in the Palestinian governmental context
d. Provide guidance on how to ensure the system is AI-ready

8.6. Public Facing Results Portal Design

a. Develop the concept and functional design for a public facing results and transparency portal, including:
    i. Objectives and target audiences (citizens, civil society, donors)
    ii. Core functionalities (e.g., dashboards, indicator tracking, reports)
    iii. Data disclosure principles and update frequency
    iv. Governance and institutional responsibilities for content management
b. Ensure alignment with reform objectives including transparency, accountability, and communication

8.7. Technical and Procurement Specifications

a. Prepare procurement-ready documentation for the digital M&E system, including:
    i. Functional specifications

ii. Technical requirements (architecture, interoperability, security)
iii. Data management and governance requirements
iv. Performance and service requirements

b. Define:
   i. Implementation phases and milestones
   ii. Testing and acceptance criteria
   iii. Maintenance and support needs

c. Ensure that specifications are technology-neutral, do not restrict competition, and are aligned with national procurement regulations and practices

WP8 Deliverables	Delivery period
D15. Digital M&E System Functional Requirements Document Comprehensive description of system functionalities, user roles, workflows, and use cases over the entire the M&E cycle.	36 weeks after the start of the contract
D16. Data Architecture and Interoperability Design Report Definition of data flows, architecture, interoperability requirements, standards, and data governance alignment.	36 weeks after the start of the contract
D17. Market Assessment and Technology Options Report Includes: - Technology landscape overview - Structured assessment of COTS, bespoke, and hybrid approaches - Comparative decision matrix and trade-off analysis - Indicative implementation scenarios	38 weeks after the start of the contract
D18. Emerging Technologies (including AI) Assessment Note Includes: - Practical use cases for AI and emerging technologies - Readiness and feasibility assessment - Risk analysis and governance considerations - Recommendations for a multi-phase adoption	38 weeks after the start of the contract
D19. Public Results Portal Concept Note Defines purpose, functionality, governance, and integration with the broader M&E system.	38 weeks after the start of the contract
D20. Technical and Procurement Specifications Package A complete, procurement-ready package including: - Functional and technical specifications - System architecture requirements - Implementation roadmap and milestones - Testing, acceptance, and quality assurance criteria	40 weeks after the start of the contract

The contractor shall apply an adaptive, participatory, and iterative implementation approach. Technical outputs and deliverables shall be progressively developed through structured engagement, joint analysis, co-design, and practical testing with the government partners (primarily MoFP). The methodology shall ensure that partner institutions are substantively involved in diagnosis, design, creation, refinement, and piloting, rather than only in final review and endorsement.

The following table summarizes the Deliverables listed above.

Week	Deliverable	Description
6	D1	Inception Report
12	D2 (Draft)	National M&E Framework (draft)
15	D2 (Final)	National M&E Framework (final endorsed version)
16	D3	Revised SRF Methodology Document
20	D4	Updated SRF and Indicator Framework
22	D5	Institutional and Functional Design Report
24	D6	M&E Integration Framework
26	D7	Updated Planning and Budgeting Guidance Notes
30	D8	Operational SOPs and Toolkits
36	D9	Pilot Implementation Report
32	D10	Capacity Development and Change Management Strategy
32	D11	Competency Frameworks and Training Roadmap
36	D12	Training Modules and Materials
38	D13	System Stewardship Package
40	D14	System Handover and Transition Protocol
36	D15	Digital M&E System Functional Requirements Document
36	D16	Data Architecture and Interoperability Design Report
38	D17	Market Assessment and Technology Options Report
38	D18	Emerging Technologies (incl. AI) Assessment Note
38	D19	Public Results Portal Concept Note
40	D20	Technical and Procurement Specifications Package

All deliverables (WP1-WP8) shall be subject to the following review process:

- The contractor submits a draft deliverable
- GIZ and/or the Government provide consolidated written comments within 15 working days
- The contractor submits a revised final version within 10 working days, with a comment response table
- Deliverables are considered accepted upon written confirmation by GIZ
- No more than two revision rounds per deliverable are expected. If additional rounds are required, this shall be agreed in writing

The deliverable deadlines specified above refer to the submission of technically complete drafts by the contractor. If government review, validation, or endorsement processes result in delays beyond the contractor's control, the parties shall agree in writing on revised submission timelines through a formal workplan amendment. The contractor shall proactively point out anticipated delays at least 3 weeks in advance.

All deliverables shall be submitted in English, with executive summaries in Arabic. Key operational documents including D2 –D8 and D11–D14 shall also be provided in Arabic. A fixed budget for translation costs is included in the price schedule (financial offer).

2.3 Project and knowledge management requirements

Requirements on the assignment of experts:

- The contractor is responsible for selecting, preparing, training and steering the experts assigned to carry out the advisory services.

Requirements on expenditure management and cost control:

- The contractor manages costs and expenditures, accounting processes and invoicing in line with GIZ requirements.

Monitoring and reporting requirements:

- The contractor plays an active role in the results-based monitoring of the project. Regular monitoring activities must cover at least the following areas*:*
  - Degree to which activities are implemented
  - Degree to which the objectives, indicators and milestones listed in section 2.2 of these ToRs have been achieved
  - Results that have occurred in the contractor’s sphere of responsibility
  - Results that have occurred outside the contractor’s direct sphere of responsibility, e.g., delays in implementation due to insufficient collaboration or feedback from key partners on the side of the Palestinian Government
  - Risks

The contractor reports to GIZ as follows:

Instead of the reporting language stipulated in GIZ’s General Terms and Conditions of Contract (German), the contractor provides the following reports in English.

- Inception report (6 weeks after the start of the contract; 5-7 pages)
- Interim monthly report(s) (3-5 pages)
- Final report on 40 weeks after the start of the contract; 8-10 pages).

The interim report(s) and the final report should provide information about the progress made towards objectives in each of the monitoring areas specified above.

Requirements for company-wide learning, knowledge and innovation:

- The contractor provides support in implementing a project evaluation with special emphasis on ensuring the effectiveness of the knowledge management process.
- The contractor expresses willingness, if required, to support project assistants or staff members on temporary placements who, in the context of GIZ's separately financed training programmes for junior employees, work in and undertake special tasks for the project.

Backstopping requirements:

The contractor ensures appropriate backstopping. The following services form part of the standard backstopping package. In accordance with GIZ's General Terms and Conditions for supplying services and work on behalf of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, these services – as well as the ancillary personnel costs – must be priced into the fee schedules of the staff listed in the tender:

- The contractor's responsibility for its own staff;
- Ensuring the flow of information between GIZ and the contractor's field staff;
- Process-oriented technical and conceptual steering of the consulting services;
- Steering adaptations to changing framework conditions;
- Performance monitoring;
- Ensuring the administrative management of the project;
- Ensuring compliance with reporting requirements;
- Technical support by the contractor's staff for its personnel on the ground;
- Making local use of and sharing the lessons learned by the contractor with the GIZ team.

2.4 Data protection and information security

Data Protection

The provisions on data protection and information security of the current version of GIZ's General Terms and Conditions of Contract (sections 1.7 Confidentiality and 1.11 Data protection) apply.

The performance of the contract may be associated with the processing of personal data by the contractor, such as (but not limited to) names and contact information and who would alone define the nature of such data and how such processing would be carried out. In such cases, the contractor shall act as an independent DATA CONTROLLER and must alone comply with ALL applicable data protection obligations, including those stemming from regional and local laws. The contractor shall process personal data only when a given goal cannot be reasonably attained without such data. The data protection principles such as lawfulness, data minimization, accuracy, purpose limitation, storage limitation, transparency, integrity and confidentiality, and accountability, as well as the numerous rights of the data subject must be paid due attention. The GIZ is NOT in any way responsible for such processing.

If the contractor is not subject to the GDPR and the applicable laws do not contain any explanation on the data protection principles and rights mentioned here, the definitions and meanings provided by the GDPR (Regulation (EU) 2016/679) should be considered.

The digital tool developed or upgraded on behalf of a local partner of GIZ must meet the highest data protection standards, especially those relating to data protection by design and by default, as stated in Annex 1. “Data protection standards for developing digital tools meant for GIZ’s partners”. The contractor is therefore required to inform GIZ if any applicable national requirement is incompatible with the provisions of this annex. We equally recommend the partner to conclude data protection agreements with the hosting service provider(s) and the maintenance service provider(s), where applicable. GIZ would be available to support the partner whenever need arises.

Whenever the contractor executes the instructions of a partner to GIZ with regard to such processing, the partner shall be the data controller, and the data processing shall be carried out in accordance with the partner’s instructions as well as laws and standards to which it is subject.

Without limiting any other obligations under the applicable law, the contractor will ensure appropriate protection of the Personal Data processed and the interests of the Data Subjects in conformity with the following minimum rules:

Lawfulness, Fairness and Transparency: Personal Data shall be processed lawfully, fairly and in a transparent manner in relation to Data Subject

Data Minimization and Storage Limitation: The Processing of Personal Data shall be adequate, relevant and limited to what is necessary in relation to the purposes of this contract. It shall be kept in a form which permits identification of Data Subject for no longer than is necessary for the pursued purposes or for other lawful and justifiable purposes, such as auditing or legal proceedings. Specifically, personal data revealing racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership, as well as genetic data, biometric data, or data concerning health or data concerning a natural person's sex life or sexual orientation must only be collected in a strictly anonymous and aggregated manner.

Appropriate Technical and Organizational Measures: The Contractor will maintain state-of-the-art technical and organizational measures to safeguard the security of the Personal Data and protect its confidentiality, integrity, and availability. Such measures must be proportionate to the sensitivity of the Shared Personal Data and to the likelihood that a risk to the Shared Personal Data materializes.

Information Security

The present assignment might deal with sensitive and confidential information. Under no circumstances are the experts and employees of the contractor (as a company and as individuals) allowed to provide, share, release or disclose any information or materials of the partner. Under no circumstances are the consultants (as a company and as individuals) allowed to provide, share, release or disclose any information or materials such as the processed data by the partner or information on the partner’s business operations to any third party outside of this agreement. We equally recommend the partner to conclude an additional non-disclosure agreement or confidentiality agreements with the contractor or other service providers, where applicable.

The international standards of information security ISO 27001 or similar must be applied and implemented as part of the development, unless the partner explicitly demands otherwise. A

deviation by the partner must be documented in writing. The developed, operated or upgraded IT platform on behalf of the partner must meet the highest information security standards, especially the principle of security by design and further measures.

For coordinating the necessary security requirements, the regulations with regard to information security or cybersecurity from the partner or from local law of the partner's country and the current state of art of technical and organizational measures must also be taken into account by the contractor.

The contractor must inform the partner immediately and in an appropriate form about security incidents that may affect the partner. If the partner has appointed an IT security officer or another person to receive such information, the information must be sent directly to this person.

2.5 Other requirements

Safeguards and gender measures with specific reference to services:

In order to promote gender equality and avoid or mitigate possible unintended negative impacts in its area of responsibility, the contractor should implement the following measures:

- **Gender equality**: The contractor shall mainstream gender equality considerations across all Work Packages. The contractor shall engage PCBS on the appropriate data disaggregation to capture the different impacts of public policies on women and men. Capacity development for M&E shall ensure equitable access for women in M&E and data management. The contractor shall document gender-relevant considerations in all relevant major deliverables.

- **Conflict and context sensitivity**: The contractor shall always implement its services in a manner that is sensitive to the specific conflict-affected and politically fragile context of Palestine and shall actively work to prevent its activities from generating political or institutional tensions or harm to individuals involved in the assignment. The contractor shall:
  - apply the "do no harm" principle throughout all stakeholder engagement and institutional design processes, ensuring that proposed governance arrangements and accountability mechanisms do not disadvantage specific institutions or individuals or lead to political targeting.
  - maintain strict political neutrality in all aspects of system design (particularly in relation to the integration of M&E into budgeting, oversight, and accountability mechanisms) and ensure that proposed arrangements serve institutional functions not political interests.
  - develop a contingency approach within the work plan for situations where access of or to key government counterparts/institutions is impeded due to political developments, security incidents, or institutional reorganization, and shall define alternative engagement methods;

- **Human rights**: The contractor shall ensure that the national M&E system it designs does not enable or facilitate violations of the right to privacy or other human rights through inappropriate collection, storage, or publication of personal or sensitive data. Specifically, the contractor shall:
  - ensure that the data governance framework includes clear data classification principles and data protection provisions consistent with applicable Palestinian law and internationally recognized data protection standards, as well as the requirements outlined in section 2.4. above.
  - ensure that the public results portal design (WP8) applies data disclosure principles that protect personal data and do not enable identification of individuals through aggregated indicator data, particularly in relation to sensitive sectors (e.g., health, social protection, and justice); Specifically, personal data revealing racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership, as well as genetic data, biometric data, or data concerning health or data concerning a natural person's sex life or sexual orientation must only be collected in a strictly anonymous and aggregated manner.
  - ensure that the procurement specifications for the digital platform include mandatory data security and privacy requirements (outlined in section 2.4., and that the AI and emerging technologies assessment explicitly addresses ethical and human rights dimensions of AI use in public sector and in performance management through a fundamental rights impact assessment.

Security precautions:

- Any travel of international staff of the contractor to the State of Palestine needs to be advised to the Risk Management Office (RMO) of GIZ Palestine through the project team. The contractor shall ensure that all activities in the country of assignment, including workshops and LMA visits, are planned and conducted with awareness of the local security situation, in coordination with the GIZ country office, and in compliance with applicable GIZ security guidelines.
- The tenderer is required to develop a safety and security risk management concept that follows international norms such as ISO 31000 or the Humanitarian Security Risk Management approach. GIZ strongly recommends the development of a security concept. GIZ will require the winning tenderer to elaborate its concept.
- The contractor must adhere to all rules and regulations under GIZ's security risk management (SRM, will be shared with the winning tenderer only). The contractor is required to prevent any behavior that could frustrate GIZ's SRM concept.
- GIZ can require that international staff complete a security training before deployment to the State of Palestine. Up to EUR 1500 will be reimbursed upon evidence. Those costs are included in budget for safety and security measures (see section 5.8 of those Terms and Reference).
- Upon travel inward, the contractor will be required to inform RMO, through the host GIZ Project, about their flight / travel details and fill-in a visitor GIZ Form
- If assessed needed GIZ RMO will be able to provide pre-arrival orientation briefing

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The contractor's staffing profile should be balanced in terms of gender and age.

3. Technical-methodological concept

In this section, the tenderer is required to reflect on the objectives and terms of reference of the tender at hand, describe the partner system and its processes in the area of responsibility and present the technical-methodological concept for completing the tasks listed in section 2 and achieving the set objectives. In addition, the tenderer must describe the design of the project management process.

3.1 Interpretation of objectives (section 1.1 of the assessment grid)

The tenderer is required to interpret the objectives for which it is responsible. Simple repetition of the objectives formulated in section 2 of the ToRs is not desired. Rather, the tenderer is to describe and interpret the changes in the partner system that are to be directly achieved by the object of the tender procedure (i.e., what a functional, institutionalized, and digital-ready National M&E System means for the Palestinian Government in practice, including how it should connect national results monitoring and evaluation with sectoral and LMA level management, planning, budgeting, and project level information without reducing the national M&E system to project monitoring and reporting). The resulting positive impact of a functioning national M&E system on the partner system under the specific conditions of the Palestinian Authority, including the political, fiscal, and administrative constraints (section 1.1.1 of the assessment grid) should also be presented.

The respond to this requirement shall not exceed **three** pages.

The tenderer must undertake a critical examination of the ToRs (section 1.1.2 of the assessment grid), by:

- an assessment of the key assumptions, dependencies, and potential gaps in the proposed Work Package design, including sequencing, scope, institutional feasibility, and the relationship between system design, piloting, and digital enablement,;
- a critical review of the proposed expert team composition and level of effort in relation to the scope and complexity of the tasks;
- an identification of assumptions underlying the ToR design that the tenderer considers optimistic, uncertain, or requiring active management;
- proposed adjustments or additions to the approach (with justification) if deemed necessary for the successful delivery.

The respond to this requirement shall not exceed **two** pages.

3.2 Processes and actors in the partner system (section 1.2 of the assessment grid)

– Not applicable –

3.3 Strategy (section 1.3 of the assessment grid)

The strategy for delivering the services in the tender is the core element of the technical-methodological concept. The strategy for delivering the services is the core element of the technical-methodological concept. The tenderer shall describe the strategic choices and methodological principles through which it intends to achieve the objectives of the assignment. The strategy shall address:

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- The approach to achieving the objectives and managing the interdependencies between WPs
- Partnership and co-production with government counterparts
- Approaches for institutionalization, sustainability, and leverage

3.3.1 Strategic approach to achieving the objectives mentioned in the ToRs (section 1.3.1 of the assessment grid)

The tenderer is required to describe and justify the overall strategic approach it intends to adopt to deliver the services described in section 2 and achieve the assignment objectives. This must be a description of strategic choices and their rationale and not a rephrasing of the work plan or a list of activities.

The strategic approach shall address the following dimensions:

- Sequencing and integration logic. The tenderer shall explain how it intends to manage the logical dependencies between the eight Work Packages (for example, how it will ensure that the national M&E framework (WP2) provides a sufficient foundation for institutional design (WP4) and SRF redesign (WP3) to proceed in parallel; how outputs from WPs 2-6 will be meaningfully consolidated into the digital specifications of WP8; and how it will manage the risk of deliverable fragmentation across a complex, multi-WP assignment;
- Government ownership and institutionalization. The tenderer shall describe the specific strategies it intends to employ to ensure that government counterparts, particularly MoFP, CoG actors, and LMA focal points, actively participate in the design process rather than being recipients of final products. The tenderer shall explain how it will structure the assignment so that government counterparts contribute to problem definition, option development, testing, and refinement (not only to consultation and final validation) and how it will distinguish between outputs that should be technically led by the contractor and those that should be co-produced with government;
- Approach to piloting and iterative refinement (WP6). The tenderer shall describe its approach to selecting pilot LMAs, designing meaningful pilots that test real workflows rather than demonstration exercises, and translating pilot feedback into genuine system refinements across WPs 2-5 and, where relevant, the digital requirements;
- Digital requirement analysis (WP8). The tenderer shall describe its approach to translating institutional and functional system designs into procurement-ready, technology-neutral digital specifications fo solutions achievable within the Palestinian government's digital infrastructure. The tenderer shall explain how it will assess and compare appropriate implementation options (including COTS solutions,

configuration/customization, and bespoke development) without allowing technology choices to precede or determine the institutional and functional design..

The respond to this requirement shall not exceed **five** pages.

3.3.2 Building partnerships with the relevant actors
(section 1.3.2 of the assessment grid)

– Not applicable –

3.3.3 Approaches for leverage effects and measures for scaling-up
(section 1.3.3 of the assessment grid)

– Not applicable –

3.3.4 Consideration of environmental and social compatibility requirements
(section 1.3.4 of the assessment grid)

– Not applicable –

3.4 Project management
(section 1.4 of the assessment grid)

In this section, the tenderer presents the operational plan for implementing the services in the tender, describes the procedure for coordination with GIZ or the project and the project partners, and explains its monitoring procedure.

3.4.1 Operational plan
(section 1.4.1 of the assessment grid)

The tenderer is required to submit a detailed operational plan for implementing the strategy described in section 3.3 to deliver the services described in Section 2. The operational plan must:

- cover all eight Work Packages;
- present the proposed deployment of the required expert profiles across the WPs, including level of effort, key periods of in-country presence, and arrangements for mobilizing additional specialist expertise where required;
- map all deliverables against the timeline proposed by the tenderer, demonstrating how the tenderer intends to manage parallel workstreams (specifically WP3 & WP4, WP6 & WP7, and WP6 & WP8) without compromising quality of the deliverables;
- identify the critical path of the assignment (specifically the chain of dependencies involving endorsement, piloting, and digital design) and explain how it will protect this path from delays;
- include a risk annotated timeline that identifies the milestones with highest risk and its proposed management approach for each.

The operational plan must demonstrate that the tenderer has thought through the practical sequencing challenges of this assignment and has proposed a realistic rather than optimistic timeline.

The respond to this requirement shall include a Gantt-Chart and not exceed **one** page.

3.4.2 Coordination with GIZ or the commissioning project
(section 1.4.2 of the assessment grid)

In the tender, the tenderer is required to describe the procedure for coordinating with GIZ as the commissioning party throughout the assignment. This shall include:

- the proposed frequency, format, and content of regular progress reviews with GIZ;
- how the tenderer will handle situations where GIZ and government counterpart views on priorities or approaches do not align;
- how the tenderer will report on risks and propose workplan adjustments, including the use of the progress reports specified in Section 2;
- how the tenderer will manage the review and comment process for deliverables, including its approach to producing comment-response tables and escalating unresolved disagreements.

The respond to this requirement shall not exceed **one and a half** pages.

3.4.3 Steering or coordination of measures with the relevant implementing partner
(section 1.4.3 of the assessment grid)

– Not applicable –

3.4.4 Monitoring
(section 1.4.4 of the assessment grid)

In the tender, the tenderer is required to describe how it will regularly capture and document the status of completion of the tasks, the achievement of objectives, the quality of results achieved and the risks in the area for which it is responsible in accordance with the specifications set out in section 2. The monitoring approach shall include:

- how the tenderer will track progress against the operational plan and identify deviations early, including the use of the progress reports specified in Section 2;
- how the tenderer will conduct internal quality assurance of deliverables prior to submission, including peer review processes within the expert team, and the role of the Team Leader in ensuring consistency across the WPs;
- how the tenderer will monitor the risk register established under WP1 and update it over the course of the assignment;
- how the tenderer will assess whether government stakeholders are genuinely engaging with and using the system designs produced (beyond validation workshops attendance) and how it will respond if engagement is superficial.

The respond to this requirement shall not exceed **one and half** pages.

3.5 Further requirements
(section 1.5 of the assessment grid)

Requirement 1 (5 points out 10 max.):

Operating conditions in the Palestinian public administration: The tenderer shall briefly describe the specific operating conditions within the Palestinian public administration that it considers most likely to affect the practical implementation of this assignment and explain the implications of these conditions for its proposed approach.

The respond to this requirement shall not exceed **three** pages.

Requirement 2 (5 points out 10 max.):

Institutional architecture of performance information and accountability in Palestine: The tenderer shall briefly describe its understanding of how performance information flows through the Palestinian central government institutional architecture, identifying where the key gaps, overlaps, or tensions lie and what these imply for the governance design of the national M&E system.

The respond to this requirement shall not exceed **three** pages.

4. Personnel

The tenderer is required to provide 'experts' for the positions referred to and described (scope of tasks and qualifications) in this section on the basis of corresponding CVs. The requirements on the format and content of the CVs are described in section 6.

The qualifications mentioned below correspond to the requirements for achieving the highest number of points in the technical assessment.

'One year of professional experience' is therefore defined as a cumulative 12 expert months with at least 18 expert days per month, provided no diverging definition is specified for individual qualifications.

4.1 Expert 1: Team Leader / Senior Public Sector Reform Expert

(section 2.1 of the assessment grid)

This position is a **key expert**.

Tasks of expert 1: (team leader)

- Overall responsibility for the technical quality, coherence, and complementarity of all contractor outputs across all work packages
- Leading WP1 (inception, governance design, risk planning, and stakeholder alignment)

- Lead the design, implementation, monitoring and evaluation of capacity development measures for local partners in M&E, data management, evidence-passed planning and performance-based budgeting.
- Coordinating entire assignment work and ensuring that outputs of each WP form a logically integrated system design
- Senior-level engagement with MoFP, the Council of Ministers, central government institutions, and LMAs on institutional reform priorities and decision points
- Staff management, in particular identifying the need for and timing of expert missions within the available budget, planning and managing assignments, and providing technical backstopping to team members
- Responsibility for taking cross-cutting themes into consideration, including gender equality, conflict sensitivity, and data protection
- Ensuring that monitoring and progress reporting procedures are carried out, including progress reports and formal deliverable submissions
- Responsibility for checking the use of funds and financial planning in consultation with the GIZ commission manager
- Supporting the GIZ commission manager in updating and/or adapting the assignment strategy and in preparing potential follow-on phases
- Ensure compliance with data protection and information security
- Quality assurance of all deliverables prior to submission to GIZ

Qualifications of expert 1: (team leader)

Education/training (section 2.1.1 of the assessment grid):	Master's degree or equivalent (e.g. German Diplom) in public administration, public policy, political science, economics, development studies, or a closely related field
Language (section 2.1.2 of the assessment grid):	English at C1 level in the Common European Framework of Reference for Languages (7 out of 10 points) Arabic at B2 level in the Common European Framework of Reference for Languages (3 out of 10 points)
General professional experience (section 2.1.3 of the assessment grid):	10 years of professional experience in public sector reform, governance, or institutional development
Specific professional experience (section 2.1.4 of the assessment grid*):*	8 years of experience leading the design or implementation of national or subnational M&E systems, results-based management systems, or performance management frameworks in a public sector context (5 out of 10 points) 8 years of experience working on planning-budgeting integration or performance-based budgeting reforms in developing contexts (3 out of 10 points) 8 years of experience managing complex, multiple work package technical assistance assignments involving multiple institutional counterparts at central, national levels (2 out of 10 points)
Leadership/management experience (section 2.1.5 of the assessment grid):	8 years of team leadership experience in technical assistance or advisory projects, with disciplinary responsibility for teams of 6 or more experts and budget responsibility of > EUR 500,000

International professional experience outside the country/region of assignment (section 2.1.6 of the assessment grid):	8 years of professional experience in countries outside Western Asia/MENA, with demonstrating exposure to diverse public administration reform contexts
Professional experience in the country/ region of assignment (2.1.7 of the assessment grid):	5 years of professional experience in the MENA region,
Experience in the field of development cooperation (section 2.1.8 of the assessment grid):	8 years of experience in development cooperation projects in governance or public sector reform
Other (section 2.1.9 of the assessment grid):	– Not applicable –

4.2 Expert 2: Senior M&E & Results-Based Management Expert

(section 2.2 of the assessment grid)

This position is a **key expert**.

Tasks of expert 2

- Technical lead of WP2 (National M&E System Framework and Governance), including design of system purpose, scope, core functions, institutional roles, governance mechanisms, M&E processes, and the evaluation framework
- Technical lead of WP3 (Strategic Results Framework), including SRF methodology development, harmonization of indicators across national, sectoral, and LMA levels, data standards, and alignment with planning and reporting cycles
- Lead design of the M&E integration into planning and budgeting processes (WP5), including definition of standard decision making products and performance reporting formats
- Lead definition of functional requirements for the digital M&E system (WP8, Task 8.1), translating system design into digital specifications
- Quality review of all technical outputs involving an M&E or results management dimension across WPs 4-9

Qualifications of expert 2.

Education/training (section 2.2.1 of the assessment grid):	Master's degree or equivalent (e.g., German Diplom) in public policy, development economics, statistics, social science research methods, or a closely related field with a strong quantitative/analytical component
Language (section 2.2.2 of the assessment grid):	English at C1 level in the Common European Framework of Reference for Languages
General professional experience (section 2.2.3 of the assessment grid):	10 years of professional experience in M&E, results-based management, or performance management in public sector

Specific professional experience (section 2.2.4 of the assessment grid*):*	3 projects (assignments), with at least 60 full working days each, involving the design of national, government-side, or sector-level results frameworks, including indicator development, theory of change, and data architecture, in a government setting (6 out of 10 points) 2 projects (assignments), with at least 60 full working days each, involving integrating M&E frameworks into government planning and/or budgeting processes, including design of performance reporting products for decision makers (4 out of 10 points)
Leadership/management experience (section 2.2.5 of the assessment grid):	– Not applicable –
International professional experience outside the country/region of assignment (section 2.2.6 of the assessment grid):	– Not applicable –
Professional experience in the country/ region of assignment (2.2.7 of the assessment grid):	3 years of professional experience in the MENA region
Experience in the field of development cooperation (section 2.2.8 of the assessment grid):	– Not applicable –
Other (section 2.2.9 of the assessment grid):	– Not applicable –

4.3 Expert 3: Palestinian Context Public Administration Reform Expert

(section 2.3 of the assessment grid)

This position is a **key expert**.

Tasks of expert 3

- Stakeholder navigation, coordination, and relationship management: serve as the primary day-to-day interface with MoFP, CoG actors, PCBS, MTDE, and pilot LMAs, leveraging direct institutional knowledge to facilitate access, manage sensitivities, and ensure continued engagement between international expert missions
- Local legal, administrative, and regulatory review: review all institutional design, governance, and HR-related outputs (WP2, WP4, WP5) for consistency with applicable Palestinian legislation, GPC civil service regulations, budget law, and administrative procedures; identify constraints that would render proposed arrangements legally or administratively infeasible
- Arabic-language quality assurance: ensure that all key operational deliverables produced or translated into Arabic are accurate, institutionally appropriate, and accessible to intended government audiences; this includes substantive (not only linguistic) review of translated documents

- Political economy and contextual analysis: provide ongoing analysis of the institutional context affecting reform implementation, including identification of champions, enablers, and emerging risks; advise the Team Leader on engagement sequencing and approach
- Facilitation of validation processes and workshops: lead or co-lead all stakeholder consultations, technical working group sessions, and validation workshops conducted in Arabic, ensuring that technical proposals are communicated in a contextually grounded manner and that stakeholder feedback is accurately captured and integrated into revised outputs
- Continuity management: maintain institutional relationships, coordination, and assignment continuity during periods between international expert missions, ensuring that coordination with government counterparts continues sufficiently

Qualifications of expert 3.

Education/training (section 2.3.1 of the assessment grid):	Master's degree or equivalent (e.g. German Diplom) in public administration, public policy, law, political science, development studies, or a closely related field.
Language (section 2.3.2 of the assessment grid):	Arabic at C2 level in the Common European Framework of Reference for Languages English at C1 level in the Common European Framework of Reference for Languages
General professional experience (section 2.3.3 of the assessment grid):	10 years of professional experience in public administration reform, institutional development, governance advisory, or a closely related field
Specific professional experience (section 2.3.4 of the assessment grid*):*	6 years of direct professional experience working with Palestinian governmental institutions on public administration, planning, M&E, public financial management, or institutional reform assignments with MoFP, CoM, and/or PCBS (5 out of 10 points) 4 years of experience conducting political economy analysis, stakeholder facilitation, or institutional advisory work in the Palestinian governance context, including demonstrated familiarity with the GPC civil service framework, Palestinian budget law, and the inter-institutional dynamics between central government and LMAs (3 out of 10 points) 4 years of experience facilitating multi-stakeholder technical workshops and validation processes in Arabic with senior Palestinian government officials (2 out of 10 points)
Leadership/management experience (section 2.3.5 of the assessment grid):	– Not applicable –
International professional experience outside the country/region of assignment (section 2.3.6 of the assessment grid):	– Not applicable –
Professional experience in the country/ region of assignment (2.3.7 of the assessment grid):	8 years of professional experience in the State of Palestine

Experience in the field of development cooperation (section 2.3.8 of the assessment grid):	5 years of experience delivering services under donor-funded development cooperation projects in Palestine and serving at the interface between international technical assistance teams and Palestinian government counterparts
Other (section 2.3.9 of the assessment grid):	– Not applicable –

4.4 Expert 4: Pool 1 'Organizational Development, Data Governance, Business Analyst, and Change Management' with 4 expert profiles

(section 2.3 of the assessment grid)

This pool provides experts with the following profiles in connection to the development, operationalization, and digitalization of the national M&E system, including:

- Profile A: Organizational development and institutional design
- Profile B: Data governance and statistics
- Profile C: Business analyst, digital architecture, and GovTech
- Profile D: Capacity development and change management

In derogation from the number of experts mentioned above, **2 CVs** must be added to the tender for expert from Profiles B and C. The ability of the tenderer to offer the pool of experts required here is assessed solely on the basis of these exemplary CVs.

The actual number of experts assigned from the pool may differ from the number of experts required in section 4 of the Terms of Reference. For experts not named in the tender, GIZ must confirm before the assignment that their qualifications are equivalent to those of the short-term experts proposed in the tender.

<u>Tasks of the expert pool</u>

- Expert profile A: Organizational development and institutional design
  - Technical lead of WP4 (Institutional and Functional Design), including definition of core M&E and data management functions, development of functional workflows and coordination mechanisms, design and assessment of organizational models, and legal and HR feasibility analysis against Palestinian civil service and GPC frameworks
  - Definition of job roles, responsibility matrices, and competency requirements for all M&E and data management positions
  - Assessment of the feasibility of proposed institutional arrangements within applicable Palestinian legal, HR, and administrative frameworks, including required legal or procedural adjustments and transitional arrangements
  - Support to WP6 piloting design in relation to institutional workflow testing and organizational challenge identification
  - Quality review of all outputs with an organizational design, HR, or institutional arrangement dimension
- Expert profile B: Data governance and statistics

- Technical lead of the data governance framework, including inter-institutional data sharing protocols, data classification principles, open data policy, and data protection compliance provisions
- Lead design of the SRF data architecture, including feeder data sources, data ownership and stewardship, indicator metadata standards, and data gap analysis
- Lead design of the logical data architecture for the digital M&E system (WP8), including data flows, interoperability requirements, data and metadata standards
- Interface with PCBS on statistical standards, administrative data integration, and the relationship between official statistics and the M&E system
- Interface with MTDE on alignment with national data strategy, digital interoperability frameworks, and e-government infrastructure
- Quality review of all data architecture, data governance, and statistics-related outputs across WPs 2, 3, 6, and 8
- Quality assurance for output compliance with data protection and information security requirements

- Expert profile C: Digital architecture, business analysis, and GovTech
  - Technical lead of all digital design tasks in WP8
  - Lead design of interim digital tools guidance
  - Ensuring vendor neutrality and technology independence across all digital design outputs
- Expert profile D: Capacity development and change management
  - Technical lead of WP7 on capacity development, change management, and sustainability)
  - Design of the change management and communications strategy
  - Design of training delivery modalities and oversight of training
  - Support to WP6 piloting and facilitation of pilot feedback and learning workshops
  - Support to WP1 planning communications and stakeholder engagement
  - Design of career track and incentive proposals for M&E professionals within the Palestinian civil service and GPC framework under WP4

<u>Qualifications of the expert pool 1 (profiles B and C)</u>

Education/training (section 2.4.1 of the assessment grid):	Profile B: 1 expert with a Master's degree or equivalent (e.g., German Diplom) in statistics, data science, information management, computer science, or a closely related quantitative field Profile C: 1 expert with a Master's degree or equivalent (e.g., German Diplom) in computer science, information systems, software engineering, or a closely related technical field
Language (section 2.4.2 of the assessment grid):	All expert with English at C1 level in the Common European Framework of Reference for Languages.

General professional experience (section 2.4.3 of the assessment grid):	Profile B: 1 expert with 8 years of professional experience in data management, data governance, statistical systems, or data systems architecture, preferably with exposure to public sector data environments, with experience in data protection and information security Profile C: 1 expert with 8 years of professional experience in enterprise IT architecture, digital government systems design, or GovTech solution development
Specific professional experience (section 2.4.4 of the assessment grid):	Profile B: 1 expert with experience in 3 projects (assignments), with at least 60 full working days each, involving designing data governance frameworks and data management architectures for government institutions, including experience at the interface of administrative data systems and official statistical systems Profile C: 1 expert with experience in 3 projects (assignments), with at least 60 full working days each, involving designing digital system architectures and preparing functional and technical specifications and procurement-ready documentation for government information systems, including structured technology assessment and options analysis
Leadership/management experience (section 2.4.5 of the assessment grid):	– Not applicable –
International professional experience outside the country/region of assignment (section 2.4.6 of the assessment grid):	All experts having each 5 years of professional experience in countries outside the MENA region
Professional experience in the country/ region of assignment (section 2.4.7 of the assessment grid):	– Not applicable –
Experience in the field of development cooperation (section 2.4.8 of the assessment grid):	– Not applicable –
Other (section 2.4.9 of the assessment grid):	Profile B: 1 expert with DAMA Certified Data Management Professional (DAMA-CDMP) certification and Data Protection and Information Security training/certification is an advantage. Profile C: 1 expert with certification in enterprise architecture or business analysis/requirements engineering (TOGAF, IREB CPRE, or IIBA CBAP) is an advantage.

Additional Qualifications of the expert pool 1 (profiles A and D)

- Education/training:
  - Profile A: 1 expert with a Master's degree or equivalent (e.g., German Diplom) in public administration, organizational management, human resource management, institutional development, or a closely related field
  - Profile D: 1 expert with a Master's degree or equivalent (e.g., German Diplom) in education, organizational psychology, human resource development, public administration, or a closely related field
- Language: see above
- General professional experience:
  - Profile A: 1 expert with 8 years of professional experience in organizational development, institutional reform, or public administration modernization
  - Profile D: 1 expert with 8 years of professional experience in capacity development, organizational learning, or change management in a public sector or development cooperation context
- Specific professional experience:
  - Profile A: 1 expert with experience in 3 projects (assignments) involving designing organizational structures, functional roles, and workflows for government institutions, with demonstrated experience assessing feasibility of institutional reform proposals within civil service and HR frameworks
  - Profile D: 1 expert with experience in 3 projects (assignments) involving designing and delivering capacity development programmes and change management strategies for public sector reform, including competency framework development, training institutionalization, and sustainability mechanism design
- International professional experience outside the country/region of assignment: see above

4.5 Expert 5: Pool 2 'M&E and Public Administration Training Specialists' with 6 experts

This pool provides short-term training facilitation and coaching experts to support hands-on pilot coaching under WP6 and the delivery of training activities under WP7.

The experts in this pool are not part of the technical assessment, so no CVs need to be submitted with the tender. The qualifications specified for the pool are therefore minimum requirements, the fulfilment of which must be confirmed by GIZ before the experts are assigned.

The actual number of experts assigned from the pool may differ from the number of experts required in section 4 of the Terms of Reference. For experts not named in the tender, GIZ must confirm before the assignment that their qualifications are equivalent to those of the short-term experts proposed in the tender.

Tasks of the expert pool 2

- Hands-on coaching and troubleshooting support to pilot LMA staff during WP6 piloting
- Facilitation of training workshops for M&E and data management staff in central government institutions and LMAs (WP7)

- Arabic-language facilitation of technical sessions with LMA focal points and government working groups, ensuring accessibility for participants with no or limited English skills
- Support adapting training materials for specific sector contexts and trainees
- Documentation of training sessions, participant feedback, and lessons learned

Qualifications of the expert pool 2

Education/training:	All experts with a university degree in public administration, education, social sciences, or a related field
Language:	2 experts with knowledge of English B2-level in the Common European Framework of Reference for Languages all experts with knowledge of Arabic C1-level the Common European Framework of Reference for Languages
General professional experience:	All experts, each with 5 years of professional experience in training facilitation, capacity development, or public administration advisory work
Specific professional experience:	All experts with 3 years of experience delivering training or facilitating technical workshops for government staff in M&E, planning, results-based management, data management, or a closely related subject, in Palestine or the MENA region
Leadership/management experience:	– Not applicable –
International professional experience outside the country/region of assignment:	– Not applicable –
Professional experience in the country/ region of assignment:	6 experts with 3 years of professional experience in Palestine, with familiarity with the Palestinian public administration structures, working culture, and institutional constraints as well as. Direct experience with Palestinian LMAs, MoFP, or PCBS is preferred
Experience in the field of development cooperation:	6 experts with 3 years of experience delivering services under development cooperation projects, preferably related to governance, public administration, or M&E
Other:	– Not applicable –

The tenderer must assign all the proposed experts to the required qualifications and clearly present them in a separate table preceding the CVs. The summary presentation must mention only qualifications that are actually indicated in the CVs. Professional experience must be evidenced by meaningful references in the CVs. It is advisable to make explicit reference to each example of professional experience.

Soft skills of team members

In addition to their specialist qualifications, all team members are also expected to have the following qualifications:

- Team skills and the ability to work effectively in a multi-disciplinary, multi-cultural team across different working locations
- Initiative and the ability to adapt to evolving institutional dynamics
- Strong communication and facilitation skills, including the ability to engage effectively with senior government officials and technical staff
- Sociocultural and intercultural sensitivity, particularly in relation to the Palestinian institutional and political context
- Efficient, partner- and client-oriented working methods
- Interdisciplinary thinking, particularly the ability to connect institutional, technical, data, and digital dimensions of system design

Soft skills are not evaluated.

Staff presentation

– Not applicable –

5. Costing requirements

In your tender, please do not deviate from the specification of inputs required in these ToRs (the number of experts and expert days, the budget specified in the price schedule). This is part of the competitive tender and is used to ensure that the tenders can be compared objectively. Please note: only services that were commissioned by GIZ and rendered by the contractor will be remunerated. We would also like to point out that it may not be necessary to make use of the total number of proposed expert days.

5.1 Assignment of experts

The number of expert days corresponds to full working days.

Expert	Expert days in the country of residence /remote	Availability of expert in the country of assignment* in expert days	**Expert days in total**	Consecutive stay > 3 months (see General Terms and Conditions, section 3.6.2)	Number of international flights	Number of national flights
Expert 1: **Team Leader**	50	40	**90**	No	10	0
Expert 2: **M&E Expert**	75	35	**110**	No	10	0
Expert 3: **PAR Expert in Palestine**	0	80	**80**	No	0	0
Expert 4: **Pool of Organizational Development, Data Governance, Business Analyst, and Change Management Experts**	240	40	**280**	No	12	0
Expert 5: **Pool of Training Specialists**	0	100	**100**	No	0	0
Backstopping	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable

5.2 National administrative staff

The following national administrative staff are needed:

1 Coordinator/Administrator for 12 months:

This position is responsible for day-to-day logistical coordination, scheduling of government meetings and workshops, administrative document handling, local financial administration, and general operational support to the expert team (expert positions 1 to 5).

5.3 Travel expenses

5.3.1 Travel – sustainability considerations

GIZ would like to reduce greenhouse gas emissions (CO_2 emissions) caused by travel. When preparing your tender, please incorporate options for reducing emissions, for example by selecting the lowest-emission booking class (economy) or using means of transport, airlines and flight routes that are more CO_2-efficient. For short distances, travel by train (second class) or e-mobility are the preferred options.

CO_2 emissions caused by air travel must be offset. GIZ specifies a budget for this, through which the carbon offsets can be settled against evidence.

There are many different providers in the market for emissions certificates, and they have different climate impact ambitions. The Development and Climate Alliance has published a list of standards (only in German available). GIZ recommends using the standards specified there.

5.3.2 Travel expense requirements

The specified prices are the maximum amounts the tenderer can include in the tender. In other words, the tenderer can also offer lower individual prices.

Higher prices shall not be included in the tender.

The travel expenses must be costed as follows by the contractor:

Travel expenses item	**Quantity**	**up to budget per unit in EUR**
Total number of international flights	30	550 EUR per return flight
CO_2 offsets for flights An unalterable budget for CO2 offsets for settlement against evidence is specified.	1	3,000 EUR
Airport transfer costs (rail travel, public transport, taxi)	30	60,00
Per-diem allowances (per day)	115	49,00
Accommodation allowances (per night)	115	139,00
Other travel expenses (visa, project-related travel expenses outside the place of business, Taxi trips in the country of assignment)	1	2,000,00

Per-diem allowances are reimbursed as a lump sum up to the contractually agreed amount.

In addition, for the following items, reasonable costs can be settled against evidence up to the proposed amount.

- Other travel expenses

Notes on the settlement of accommodation allowances outside Germany:

For the State of Palestine, tenderers may offer accommodation allowances up to EUR 139,00. This is the maximum amount permissible under tax law as per the BMF circular on travel expense reimbursement.

- If the contractor offers accommodation allowances at up to 75% (EUR 104,25) of the maximum amounts permissible under tax law as per the BMF circular on travel expense reimbursement, the expenses will be reimbursed **on a lump-sum basis** in the contractually agreed amount.

- If the contractor offers accommodation allowances at between 75% and 100% (EUR 104,26 to 139,00) of the maximum amounts permissible under tax law as per the BMF circular on travel expense reimbursement, the corresponding **evidenced expenses** will be reimbursed up to the contractually agreed amount.

Accommodation allowances outside Germany that exceed the maximum amount permissible under tax law as stipulated by BMF and were unavoidable (e.g. due to security requirements) can be settled exclusively on presentation of a written justification of the specific case for the evidenced costs up to the contractually agreed amount.

All travel activities must be agreed in advance with the project manager. Travel expenses must be kept as low as possible.

Note on travel and transportation:

Transportation and accommodation should have flexible cancellation policies, please document that you chose the most cost-effective scenario for travel planning. Cancellation costs for travel in the West Bank and East Jerusalem can only be covered if no flexible cost-effective arrangements could be made or non-flexible arrangements were considering the risk more economical. For international travel, rescheduling of flights due to ad-hoc closure of airspace is foreseeable. Against this background, the contractor is responsible for risk-aware travel management (e.g., flight insurance, flexible flight tickets). Hence, costs related to rescheduling and cancellation of flights due to closures of airspace cannot be reimbursed and claims need to be made towards the transportation provider.

5.4 Materials and equipment

– Not applicable –

5.5 Operating costs in the country of assignment

The contractor will use GIZ working stations within the project's office during international expert missions. Thus, the bidder does not calculate any operating costs in the country of assignment in its financial offer.

5.6 Workshops, education and training

The contractor runs the following workshops and training courses:

1. Inception and Alignment Workshop
2. M&E Framework Validation Workshop
3. SRF Methodology Validation Workshop
4. SRF and Indicator Review Workshop
5. Institutional Design Validation Workshop
6. Integration Framework Validation Workshop
7. Pilot Kick-off and Orientation Workshop
8. Pilot Feedback and Learning Workshop
9. Training Delivery (1st round M&E and data management staff)
10. Training Delivery (2nd round LMA focal points, other LMAs)
11. Training Delivery (system stewardship)
12. Final Dissemination and Handover Event

Workshop budget: EUR 40,000

The fixed, unalterable budget above is earmarked for workshops and entered in the price schedule. The budget includes the following costs relating to the planning and running of workshops:

- Room hire (where not provided free of charge by MoFP or GIZ)
- Technical systems (projectors, screens, microphones, videoconferencing equipment where required)
- Translation and interpreting services (Arabic-English simultaneous or consecutive interpretation for validation workshops involving international experts)
- Catering (refreshments, snacks, and lunches for participants)
- Workshop materials (printed handouts, flip charts, stationery)
- Other costs directly related to the organization and running of workshops

The budget does not include the fees and travel expenses for the contractor's experts incurred in connection with the planning and running of the workshops. These are covered by the corresponding number of expert days and travel expenses (see sections 5.1 and 5.3 above).

5.7 Local contributions

– Not applicable –

5.8 Other costs

Budget for safety and security measures: 9,000 EUR (settlement against evidence)

The fixed, unalterable budget above is entered in the price schedule and earmarked for the following costs:

- Up to 1,500 EUR per Expert for completing security training at the request of GIZ Palestine RMO prior to deployment to the county of assignment.

Budget for translation: EUR 6,000 (settlement against evidence)

The fixed, unalterable budget above is entered in the price schedule and earmarked for the following costs:

- Professional translation of key deliverables (operational deliverables that government counterparts and LMA staff must use and reference independently) into Arabic.

5.9 Flexible remuneration item

Budget for flexible remuneration: EUR 60,000

The fixed, unalterable budget above is earmarked in the price schedule for flexible remuneration. Flexible remuneration is intended to facilitate the flexible management of the contract by the commission manager at GIZ. The contractor can make use of the funds in accordance with section 3.6.5.7 of the General Terms and Conditions.

6. Requirements on the format of the tender

The structure of the tender must correspond with the structure of the ToRs. It must be legible (for example Arial, font size 11 or larger) and clearly formulated. The technical tender must be written in English.

The technical-methodological concept of the tender (section 3 of the ToRs) must not exceed 20 pages (not including the cover page, list of abbreviations, table of contents, brief introduction and CV for the backstopper). Additional annexes not requested will not be assessed. External content (e.g. links to websites) will also be disregarded.

The CVs of the staff proposed in accordance with section 4 of the ToRs must be in the EU format and not more than four pages in length. The CVs shall be submitted in English.

The CVs must clearly and unequivocally show what position the proposed person held, which tasks they performed and how long they worked during which period in the specified references. **The references contained in the CVs must therefore include the following information:**

- Name of the company/organisation/reference project in which the expert worked

- Position held and task(s) performed by the expert in the company/organisation/reference project
- Work outcomes or products produced by the expert, or expert's contribution to the completion of these outcomes and projects (if relevant)
- Duration of the expert's assignment in the company/organisation/reference project per calendar year **in full-time expert days, weeks or months** (for example: 2019: 2 months, 2020: 10 months, 2021: 1 month)
- Leadership experience/management: clear information on the reference projects or fixed positions within the company/organisation in which the requirements specified in section 4 were fulfilled (for example, period, number of persons for whom the expert had disciplinary responsibility, project budget)
- International professional experience/professional experience in the country of assignment: clear information on the reference projects or fixed positions in the company/organisation in which the requirements specified in section 4 were fulfilled (for example, actual duration of assignment on the ground **in full-time expert days, weeks or months**)

In order to facilitate the assessment, we request that you number the references sequentially and provide only references that are clearly related to the object of this tender.

7. Options or follow-on contract

7.1 Option to expand the service content/extend the contract term pursuant to section 132 (2) no. 1 German Act against Restraints of Competition (GWB)

GIZ can exercise the following option if it wishes to expand the tendered services. This is described in detail below.

Nature and scope:

While retaining the overall character of the contract, there is a possibility of GIZ continuing to obtain the services specified in section 2 of these Terms of Reference and/or of expanding the contract to include further services of the same kind. The overall contract term must not exceed three times the original contract term, and the overall contract value must not exceed twice the original contract value.

Precondition:

GIZ's commissioning party extends and/or provides additional funding for the current project or commissions a follow-on project and/or an agreement is concluded to provide cofinancing for the measure.

7.2 Option to procure materials and equipment pursuant to section 132 (2) no. 1 German Act against Restraints of Competition (GWB)

– Not applicable –

7.3 Follow-on contract pursuant to Section 14 (4) no. 9 German Ordinance on the Award of Public Contracts (VgV)

Pursuant to Section 14 (4) no. 9 VgV, GIZ reserves the right to award a follow-on contract to the contractor in order to procure similar services.

Scope of possible services:

The term of the follow-on contract must not exceed twice that of the original contract, and the value of the follow-on contract must not exceed twice that of the original contract.

Condition: The above option is subject to GIZ receiving a commission from the commissioning party or the conclusion of an agreement for cofinancing of the measure. Any follow-on contract must be awarded within three years of the award date of the original contract.

A follow-on contract under 7.3 can be considered only as an alternative to the option in 7.1.

8. Annexes

- A - Data protection standards for developing digital tools meant for GIZ's partners