**EU4Culture - Promoting Culture & Creativity as an Engine for Economic Growth and Social Development in EaP (Eastern Partnership) Countries**

**Annex 1**

**Terms of Reference**

**Subcontractor/External Service Provider on Cultural Indicators and Statistics**

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| Coordinator of the grant contract: | Goethe-Institut (GI) |
| Name and title of the contact person: | Dr. Anatoli Beifert – Team Leader |
| Name of beneficiary(ies) and affiliated entity(ies) in the action: | Czech Centers (CC), Danish Cultural Institute (DCI), Institut français en Géorgie (IF) |
| Title of the action: | EU4Culture: Promoting Culture & Creativity as an Engine for Economic Growth and Social Development in EaP Countries |
| Contract number: | 2020/417-654 |
| Target country(ies) or region(s): | EaP |

## 1. Background of the Project

EU4Culture is the EU funded project and targets the cultural and creative sector in the Eastern Partnership (EaP) countries, aiming to support the development of culture as an engine for growth and social development across the region, with particular focus on non-capital cities and towns (NCC/Ts).

In Armenia, Azerbaijan, Georgia, the Republic of Moldova, and Ukraine, the EU4Culture project supports Non-Capital Cities in developing and implementing Cultural Development Strategies. EU4Culture also supports the cities with capacity building activities related to strategy development, strategy sustainability, internationalization, cultural enterprise and management, and cultural indicators and statistics. A grant scheme for cultural projects, cross-innovation projects, festivals, and a mobility scheme complement the project.

Within the EU4Culture project a maximum of three non-capital cities/towns from Armenia, Azerbaijan, Georgia, Republic of Moldova, and Ukraine received grants of a maximum of EUR 30,000 to design a Cultural Development Strategy[[1]](#footnote-1). In July/August 2022, one non-capital city/town in each participating EaP country was selected to receive a maximum EUR 300,000 to implement the Cultural Development Strategy (three finalists in case of Ukraine).

The EU4Culture project is implemented by the Goethe-Institut (lead), the Danish Cultural Institute, Czech Centres, and the Institut Français in Georgia. The Project started on 1 January 2021 and will end on 31 December 2024.

## 2. Objective and Scope of the Cultural Indicators & Statistics Assignment

**Objective:**

The objectives of the EU4Culture project activity on **cultural indicators & statistics** (internal reference: Activity 3.1.4) are:

* Increase capacities of the non-capital cities to measure the impact of cultural activities and the results achieved through implementation of cultural development strategies.
* Increase capacities of the cities in data collection and processing. Support the cities to collect and analyze economic indicators linked to the local cultural and creative sector.
* With reference to EU4Culture Logical Framework Matrix (LFM) to collect, process, and analyze quantitative and qualitative data and define LFM indicator baseline and final values.

To achieve the above-mentioned objectives, EU4Culture is seeking a subcontractor/External Service Provider to deliver a) capacity building on cultural indicators; b) provide ongoing mentorship and consultancy to local authorities of the selected cities in identifying, processing, and analyzing relevant data at the local level. Additionally, the assignment must involve c) the research component, which must also be conducted by the subcontractor/External Service Provider. The three-stage research sub-activity includes collecting and analyzing data using quantitative and qualitative indicators at baseline, mid-point, and endpoint with reference to the project LFM in all EU4Culture participating cities (LFM indicators will be defined only at baseline and final values).

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| Scope: |  |
| Geographic Scope | Following cities from Eastern Partnership Countries:   * Armenia – **Ijevan**, Sevan, Charentsavan; * Azerbaijan – Sheki, **Lankaran**, Khirdalan; * Georgia – **Zugdidi**, Poti, Kutaisi; * Republic of Moldova – Orhei, **Cahul**; * Ukraine[[2]](#footnote-2) - Odessa, Rivne, and Vinnitsa; |
| Period of assignment | * September 2023 – October 2024 |
| Type of Assignment | Assignment for the External Service Provider is focused on EU4culture cities, and it foresees the following elements:   * Mentorship * Research [[3]](#footnote-3) * Capacity Building |

2.1 Description of the Cultural Indicators and Statistics Assignment

The Subcontractor/External Service Provider will actively work with the NCC/Ts to enhance their proficiency in Cultural Indicators and Statistics, thereby strengthening the evidence-based approach towards the implementation of Cultural Development Strategies. The Cultural Indicators and Statistics assignment combines three main components which are described in detail below[[4]](#footnote-4):

**a) Capacity Building**

The Subcontractor/External Service Provider will contract and train 10 local experts/trainers on cultural indicators, then thereafter those trained experts/trainers will develop a training program for citiy representatives and will deliver the training in their respective countries with the guidance and supervision of the Subcontractor/External Service Provider. The stages of capacity building are outlined below:

* Stage 1 - Delivery of training of trainers (TOT) for Local Experts/trainers - During a 3-day physical meeting in Tbilisi, either in September or October 2023, Subcontractor/External Service Provider will train 2 local experts/trainers on cultural indicators from each participating country (10 local experts/trainers in total from 5 EaP Countries) in the framework of the activity “Training of Trainers” (ToT).
* Stage 2 – Capacity Building of the cities. Development of Training Curriculum and delivery of the training by local experts on Cultural Indicators and Statistics to the EU4Culture project participating cities (1 training in each of the 5 EaP countries) - Following the ToT, local experts/trainers will develop a training module/program for the NCC/Ts, which will be delivered to relevant city representatives in their respective countries over a 4-day period under the guidance of Subcontractor/External Service Provider. The training sessions will take place in a selected city in each country and are expected to have 10 participants per session. These training sessions are scheduled to take place between November and December 2023.

External service provider will also contract in total 10 local experts/trainers and allocate minimum 10 working days per expert with the minimum honorarium of 100 EUR per day (Gross Amount). The proposed budget calculations in the tender offer must include the minimum sum of 10 000 EUR which should be allocated as the service honorarium for local experts/trainers. Selection of local experts/trainers will be conducted with the close collaboration of EU4Culture project team. Travelling and accommodation during stage 1 (ToT) and Stage 2 (Capacity building) of the local experts as well as city participants will be covered by EU4Culture project. All expenses (travelling/accommodation/per diem etc.) of the External Service Provider related to the Capacity Building must be covered by the External Service Provider.

*Based on the training needs assessment prepared in the frame of the EU4Culture project, the training on Cultural indicators (targeted at the EU4Culture participating cities representatives and delivered by the local experts/trainers after the initial ToT) should be structured around the following elements:*

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| Main focus | Cultural indicators as a tool for monitoring and improving implementation of the Cultural Development Strategies |
| Main Themes | * Introduction to cultural indicators - **general understanding** of quantitative and qualitative indicators and how to measure them with a focus on individual cultural events/activities and projects as well as national or municipal statistics. * Development of a **system for cultural indicators** - where to start and how to build a system using a step-by-step approach. * **Tools for data collection and analysis** – tools for data collection, methods for data analysis and visualization, use of data for transforming into meaningful decisions. * Importance for **monitoring and planning** - connection of data with cultural sector, how and why to monitor cultural dynamics/activities in the city and how to initiate change/adapt the Strategy accordingly. * Use of indicators for **implementation of the Strategy** – CDS is “a living” document and how the right use of indicators can help to improve the quality of the cultural offer in the cities. |
| Participants | * Representatives of the cities developing of and working with Cultural Development Strategies 10 participants per country (4 from the selected city, 3-3 from non-selected cities) |
| Hand-outs | * List of example cultural indicators with measurement tools * Manual with simple instructions on data analysis methods * Examples of data visualization * Case studies and examples from other cities and their experience with cultural indicators |

*It is expected that after this training course the participating cities will:*

* be able to **use cultural indicators in measuring** the success of cultural activities by using both – quantitative and qualitative data sets. In particular, the participants will know how to define indicators and how to measure them in relation to their Cultural Development Strategy, how to measure quantitative indicators and how to build a correlation between quantitative and qualitative indicators, how to use the data for further development and improvement of cultural activities offered in the cities.
* understand the importance of **developing a system** and mechanism in the city on how to collect and use cultural indicators. In particular, the participants will learn how to organise a consistent process for gathering and analysing the data, where to start, how this mechanism works and who should be involved, what needs to be done by cities, and what can be outsourced and done through partnerships with the private sector, universities, or CSOs (Civil Society Organisations).
* use the knowledge of indicators in **monitoring and improving implementation** of the Cultural Development Strategies. In particular, the participants will learn how to use the Strategy with its specific milestones and target figures as a baseline to further monitor if the actions are being implemented as planned, what needs to be improved and changed in the initial action plan, and how to work actively with partners to measure the effect of activities using the baseline data from the Strategy.

*The exact Capacity Building methodology will be agreed based on the proposals provided and first round consultations with the selected Subcontractor/External Service Provider.*

**b) Mentoring:**

The Subcontractor/External Service Provider will support EU4Culture participating cities by establishing a mentorship program to develop and implement quantitative and qualitative data collection methodologies. The mentorship will include:

* Assisting the cities to establish approaches to effectively utilize the collected data and make informed decisions in relation to cultural development strategies.
* Helping the cities to validate their methodologies and ensuring the accuracy of the collected data.
* Guidance for data collection and analysis throughout the Eu4Culture project period for the cities.

The mentorship will be focused and will take place in EU4culture winner cities, whereas non-winner cities will be invited and encouraged to make the best use of the mentorship opportunity, including attending physical mentorship events.

*The exact mentorship methodology will be agreed based on the proposals provided and first round consultations with the selected Subcontractor/External Service Provider.*

*Having a local partner, either a legal entity or an individual expert in each project participant country would be considered an asset.*

**c) Research**

All activities performed under the Cultural Indicators and Statistics must be based on the unique profile, individual approaches, and aspirations of the cities. Tasks performed by the External Service Provider (ESP) should be instrumental in improving the capacity of the cities to monitor, analyze, implement, and improve Cultural Development Strategies (CDS) and achieve their highest effectiveness.

For this purpose, the Subcontractor/External Service Provider will develop a research methodology/concept of Cultural Indicators and Statistics. Based on the developed research methodology/concept ESP will collect, process, and analyze quantitative and qualitative indicators data and provide corresponding reports at baseline/inception (September – November, 2023), midpoint (February 2024) and endpoint/final (September 2024).

The objectives below have the utmost relevance for the research activity:

Objective 1. with reference to EU4Culture LFM to collect, process, and analyze quantitative and qualitative data. Establish baseline values with baseline/inception report and establish current values with endpoint/final report.

Objective 2. Establishment of the Cultural Indicators with the focus on CDS implementation process.

Based on these objectives, The assignment shall also focus on the establishment of baselines and defining the current value (2024) for the Overall Objective and Specific Objective 1 of the EU4Culture project, therefore Indicators below should have the special focus and must be retrieved, analyzed, and reported from each city:

1. Number of tourists (both internal and external) per annum, disaggregated by country and NCC/T

2. Percentage of resources from the culture and tourism sectors in the budget of the NCC/T

3. Percentage of tourists satisfied with services delivery, disaggregated by country and NCC/T

**Stage 1 – Inception/Baseline Research**

Description:

Research activity stage 1 - Inception/Baseline Research, is a crucial first step in the project's research component, it will lay the foundation for the project's research component, providing a solid starting point for future data collection and analysis. During this stage, the subcontractor will work to create an Inception report (Cultural indicators Diagnostic Matrix) by conducting baseline research in each EU4Culture project participating city (with the focus on EU4culture winner cities) to identify existing data and research gaps. Also, this stage will involve developing indicators that define baseline values for EU4Culture LFM indicators. This will inform and guide the subsequent research stages, ensuring that the research is tailored to the unique needs and characteristics of each city.

Deliverables:

Inception/Baseline Report Including cultural indicators diagnostic matrix for each city (with the focus on EU4culture winner cities), as well as baseline values for EU4Culture LFM indicators.

Deadline for the 1st report delivery:

September-November 2023

**Stage 2 – Midpoint Research**

Description:

Research activity stage 2 - Midpoint Research will be conducted after the capacity building of the cities in cultural indicators. The city representatives would be equipped to provide updated and improved cultural indicators, which will be analyzed by the Subcontractor/External Service Provider using quantitative and qualitative methods. The midpoint research report will provide an overview of the current state of the cultural sector in the participating cities and will assess progress made towards achieving the goals and objectives set out in the EU4Culture project.

Deliverables:

Midpoint report Including improved and updated cultural indicators.

Deadline for the 2nd report delivery:

February 2024

**Stage 3 - Endpoint/Final Research**

Description:

Research activity stage 3 - Endpoint/Final Research, marks the culmination of the research efforts under the EU4Culture project. This stage involves conducting research to update the cultural indicators diagnostic matrix for each participating city (with the focus on EU4culture winner cities) based on the data collected throughout the project period. The final report will also provide updated values for EU4Culture LFM indicators, as well as overall observations and specific recommendations related to cultural indicators for the EU4Culture project to consider. The research will be completed and reported in September 2024, providing an evidence-based overview of the impact of the implemented CDS on the participating cities.

Deliverables:

Endpoint/Final report including updated cultural indicators diagnostic matrix for each city and relevant values for EU4Culture LFM indicators, overall observations, and specific recommendations for the EU4Culture project for consideration.

Deadline for the 3rd report delivery:

September 2024

*The exact Research Methodology/Concept will be agreed based on the proposals provided and first round consultations with the selected Subcontractor/External Service Provider.*

3. Eligibility Criteria and General Profile for Subcontractor/External Service Provider:

**Applicants must be registered in the EU or in any of the EaP countries as a legal entity and must fulfill the following eligibility criteria:**

* Solid experience of at least five years in providing research and consulting services in the field of culture, creative industries, regional development or similar, proven by the company portfolio
* Experience of working in EaP region and/or proven understanding of EaP local challenges and regional development issues
* At least five years of experience of conducting research/mentorship/capacity building/ToT for the relevant stakeholders
* Proven experience of working with and understanding the concept of cultural indicators/CCI statistics etc.
* Experience with EU projects would be an asset
* Experience working with the international cultural institutions, national and local authorities

*Eligibility and relevant experience of the applicant should be demonstrated according to the call for tender document under the technical offer sub-paragraph 4) Description of qualification and experience of the applicant and core team.*

**General qualifications of Subcontractor/External Service Provider team members:**

* Proven Understanding of Culture and Creative Sector (high priority)
* Experience in developing and conducting training modules (high priority)
* Experience in developing and conducting tailor-made and result-oriented mentorship program for public/private bodies (high priority)
* At least five-year experience in data collection (qualitative and quantitative), data processing and evaluation in the field of CCI (high priority)
* Proven understanding of quantitative and qualitative indicators of the CCI sector (priority)
* Master’s degree or equivalent in social and/or political sciences, culture, creative economy, or another relevant field
* Experience in regional development
* Experience in cultural policy development would be an asset.
* Experience as a Trainer
* Experience in working with national and local authorities such as local municipalities, statistics departments, and other relevant institutions.
* Experience in working with an international team.
* Excellent English language writing and communication skills
* A proven understanding of EU policies and the EaP region would be an asset.

*Eligibility and relevant experience of the applicant should be demonstrated according to the call for tender document under the technical offer sub-paragraph 4) Description of qualification and experience of the applicant and core team.*

## 4. Tasks of the Subcontractor/External Service Provider and Timetable

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| **Activity** | | **Tentative Timeline** |
| 1 | Confirmation of Assignment; | September 2023 |
| 2 | Introductory meetings/consultations with the EU4Culture Project  Management Team, familiarization with the project before signing the service agreement; | September 2023 |
| 3 | Deployment / Signing the service agreement; | September 2023 |
| 4 | Development of the Research Methodology/Concept /Baseline Research/familiarization with the Training Needs Assessment report and Cultural Development Strategies; | September 2023 |
| 5 | Preparation for the Training of Trainers and introductory meetings; | September 2023 |
| 6 | Training of Trainers, 3-day session in Tbilisi; | October – November 2023 |
| 7 | Conducting 4 – day trainings in the selected cities in each country; | November 2023 – February 2024 |
| 8 | Mentorship - Supporting each selected NCC/T in collection of cultural indicators over that period, and validate them; | November 2023 – October 2024 |
| 9 | Research - Collecting, processing, and analyzing data on cultural indicators at baseline, mid-point, and endpoint; | September 2023 – October 2024 |
| 9.1 | Stage 1 – Inception/Baseline Research; | September - November 2023 |
| 9.2 | Stage 2 – Mid-point Research; | February 2024 |
| 9.3 | Stage 3 - Endpoint/Final Research; | September 2024 |

## 5. Deliverables of the Subcontractor/External Service Provider Assignment

a) Capacity Building

* Capacity Building Methodology and relevant materials

b) Mentorship

* Mentorship methodology and corresponding activity plan
* Mentorship Report, including recommendations and findings

c) Research

* Inception/Baseline Report Including cultural indicators diagnostic matrix for each city, baseline values for EU4Culture LFM indicators
* Midpoint report, including improved and updated cultural indicators for each city
* Endpoint/Final report including updated cultural indicators diagnostic matrix for each city and relevant values for EU4Culture LFM indicators, overall observations, and specific recommendations for the EU4Culture project for consideration

*The language of all Assignments is English.*

## 6. Maximum allocated budget and Deadline for Submission

* Total Amount/Ceiling of the Contract Assignment - 110,000 €
* The proposed budget calculations in the tender offer must include the minimum sum of 10 000 EUR which should be allocated as the service honorarium for local experts/trainers
* The deadline for submission of the technical offer, including all the required documentation, is 15th of September.

## 7. Conflict of Interest and Confidentiality

The subcontractor shall sign the statement, declaring there is no conflict of interest related to the assignment or any other circumstances that might affect the fulfilment of the assignment. Should any conflict of interest arise which was known about but not declared beforehand, the Goethe-Institut may terminate the contract.

The subcontractor is obliged to treat all information obtained during the assignment as confidential.

## 8. Data Protection

By submitting the company portfolio and the proposal the potential company agrees that personal data is processed in compliance with [GDPR](https://eur-lex.europa.eu/eli/reg/2016/679/oj) requirements

1. Armenia – Ijevan, Sevan, Charentsavan; Azerbaijan – Sheki, Lankaran, Khirdalan; Georgia – Zugdidi, Poti, Kutaisi; Republic of Moldova – Orhei, Cahul; Ukraine - Odessa, Rivne, and Vinnitsa [↑](#footnote-ref-1)
2. The implementation of the activity format and timeline will be contingent upon the prevailing conditions and security situation due to the ongoing Russian invasion in Ukraine and the full-scale war. [↑](#footnote-ref-2)
3. Research component will be focused on those cities that received funding for CDS implementation (Ijevan, Lankaran, Zugdidi, Cahul, Vinnitsa, Odessa, and Rivne) [↑](#footnote-ref-3)
4. The proposed methodology by the ESP may in part can be inspired from the "Mapping and Strategy Building Handbook for Creative Towns and Regions", which was an output of the EU-funded Creative Towns and Regions Initiative (Part of the European Union EaP Culture and Creativity Programme). [↑](#footnote-ref-4)