

Terms of Reference

Analytical and advisory support to IFFEd's evidence, and implementation workstream

1. Context

The International Finance Facility for Education (IFFEd) is a financing mechanism for education and skills development. It is designed to address the education and skills crisis in lower-middle-income countries (LMICs) which are home to more than 1.2 billion children and youth, nearly half of the global total.

IFFEd leverages sovereign, philanthropic and private capital, unlocking greater affordable financing for lower-middle-income countries that want to invest in education and skills. The mechanism was developed by a consortium of multilateral development banks (MDBs) and bilateral donors and launched by the UN Secretary-General during the 2022 Transforming Education Summit.

IFFEd provides guarantees to the MDBs. Its dual multiplier design not only amplifies limited donor funds to increase the pool of education financing but also ensures that the unlocked financing is used to scale effective education reforms driven by outcomes and evidence.

IFFEd is developing its evidence and implementation workstream. The workstream has three pillars; 1) *building and applying the evidence base to inform the design of education and skills programmes and improve the quality of the projects IFFEd co-finances*; 2) *measuring results and generating learning, including how implementation arrangements work effectively in practice*; and 3) *sharing/communicating evidence with partners and stakeholders*.

2. Objectives

IFFEd is tendering to pre-qualify two suppliers for analytical and advisory support across the evidence, education and implementation workstream, including each of the aforementioned pillars. The selected firms will support IFFEd across a range of assignments over the life of the contract. Section 3 sets out the indicative scope of work.

IFFEd intends to enter into framework agreements with two firms. The purpose of this tender is qualification, not the award of a specific assignment. It establishes a panel of two pre-approved suppliers whose capabilities, personnel and rates have been assessed and contracted in advance, so that individual assignments can subsequently be commissioned quickly against specific Terms of Reference, without further open procurement. This tender confers no minimum value on any selected firm. Assignments are commissioned individually under the process set out in Section 6. Section 3 sets out the indicative scope from which assignments will be drawn.

3. Scope of services

The purpose of the scope of services is to ensure that IFFEd has access to flexible analytical and advisory services across the evidence and implementation workstream – in support of IFFEd’s in-house resources. The selected firms will provide additional capacity for specific tasks, commissioned as needs arise and as budget allows. This will entail producing specific outputs and supporting the IFFEd team as requested on timebound and specific tasks. IFFEd will commission work based on specific and detailed Terms of References.

The indicative primary thematic/focus areas are (not an exhaustive list):

- a) **Support to country analysis and diagnostic tool:** Support the development of a diagnostic tool assessing countries' education and skills systems – spending, coverage, equity and outcomes – using subnational data and international benchmarks. This includes portfolio-level comparison of IFFEd countries and financing modalities against relevant peers.
- b) **Building the evidence base:** Collecting the evidence across education and skills, identifying the gaps, and producing reviews, notes and briefs.
- c) **Skills-quality diagnostics:** Analysis of why skills and TVET programmes have underperformed in lower- and middle-income countries and crisis-affected countries, and what drives labour-market results, including country case studies and cross-country evidence comparisons.
- d) **Quality frameworks:** A skills diagnostic and quality-criteria framework that IFFEd can apply to screen pipeline projects, and projects under implementation.
- e) **Results and MEL:** Results and MEL approaches for co-financed education and skills projects, including a standardized labour-market outcomes framework (transition to employment, earnings, employer satisfaction) and indicators prior and during implementation.

Across these areas, the work will take a range of forms, including, 1) Analytical and evidence products; 2) Frameworks and standards; 3) Technical advice and 4) Facilitation and knowledge-sharing. Facilitation and knowledge-sharing covers the third pillar: communicating evidence to MDBs, governments, donors and other partners.

4. Illustrative deliverables

Deliverables will be set for each assignment. Deliverables are likely to include:

- Country analyses and diagnostic framework(s), set up for IFFEd’s education and skills priorities;
- Portfolio-level analysis comparing IFFEd countries and financing modalities against relevant peers, to inform allocation, implementation and strategy;
- Evidence products (reviews, notes and briefs) on agreed thematic areas;
- Quality skills diagnostic and draft project implementation quality framework;
- Inputs to IFFEd’s results and MEL frameworks; and
- Advisory notes and support for MDB and country engagement.

5. Required expertise and qualifications

IFFEd is looking for firms or consortia that, as a minimum, have:

- A strong track record of producing comparable country diagnostics at scale, setting up the framework and data once and then producing outputs across many countries without losing rigour;
- Expertise in education and skills systems, education financing, and the move from education to employment in lower-middle-income countries;
- Experience working with or alongside MDBs, bilateral partners and national governments within the Education & skills sector;
- Analytical and data skills, including building comparable datasets from recognised international sources and national administrative and budget data;
- The ability to produce valuable and applicable analysis for a variety of stakeholders and audiences.

To deliver on the thematic areas, bidding companies need to show a team with strong comparative advantages, as a minimum, in the following areas:

- **Education/skills systems expertise:** strong technical grounding in education financing, TVET and skills systems, and labour-market analysis, including in lower- and middle-income country contexts;
- **Public finance and governance:** expertise in public expenditure analysis, budget systems and governance arrangements affecting education and skills spending;
- **Quantitative and diagnostic analysis:** proven ability to work with subnational, cross-country and administrative data, and to build or apply diagnostic and quality-assessment frameworks;
- **Evidence synthesis and research management:** experience conducting literature/evidence reviews, identifying gaps, and commissioning or managing research to address them;
- **MEL and results frameworks:** expertise in monitoring, evaluation and learning design, particularly labour-market outcome indicators (employment transition, earnings, employer satisfaction);
- **MDB/IFI operational experience:** familiarity with multilateral development bank project cycles, quality assurance processes and investment-case preparation, to embed evidence effectively;
- **Communication and knowledge translation:** ability to produce clear, audience-appropriate outputs (briefs, notes, case studies) for finance, education and labour stakeholders, and to disseminate findings to varied audiences;
- **Cross-country and comparative perspective:** experience conducting case studies and comparative analysis across multiple countries.

Proposals that do not meet these minimum requirements will not be evaluated further.

6. Duration, budget and modality

The engagement is a framework arrangement. IFFEd will commission specific assignments (call-downs) as needs are confirmed. Assignments will be agreed with the selected firms on a ToR (case by case) basis.

The contract will run for a base term of one year, with two optional one-year extensions exercisable at IFFEd's sole discretion, subject to satisfactory performance and the availability of funding (a "1 + 1 + 1" arrangement).

The indicative budget for the one-year base term is US\$125,000 for the panel as a whole, covering all fees and general costs. Each selected firm must adhere to all IFFEd policies at all times (see 6.1).

The financial proposal must be presented by a table of daily rates by role (inclusive of taxes), using the template in Annex 1, valid for the base term, which will serve as a ceiling for individual call-down assignments. Each call-down will nonetheless be agreed as a fixed-price assignment against defined deliverables. Bidders must also state any other general costs that would apply in addition to fees (excluding task specific costs such as travel). Rates are firm-fixed for the base term. For any extension year, rates may be adjusted by no more than the annual change in the relevant consumer price index, subject to IFFEd's written agreement. Rates apply to the named experts. Any replacement expert requires IFFEd's prior written approval and is charged at the same or a lower rate.

The working language is English. Additional language skills in the team put forward, is considered an advantage. The firm works from its own premises. The firm is an independent contractor and is legally responsible for its own staff, at all times. The firm reports to the Director of Education, or a delegated staff member. IFFEd will give access to relevant data and documents, make introductions to relevant stakeholders when and where needed.

6.1 How assignments are commissioned

The specifications will be set out in detail in the ToRs. Each assignment is commissioned as follows:

1. **Scope:** IFFEd prepares assignment-specific Terms of Reference setting out the objective, scope, deliverables, timing, and any assignment-specific costs such as travel.
2. **Proposal:** IFFEd invites both panel firms to submit, within five working days, a proposal of no more than 10 pages, including: a brief technical approach, the named team, the level of effort by role, and a fixed price built from its contracted rate card.
3. **Allocation:** IFFEd selects one firm on the basis of technical fit, proposed team and price, weighted as set out in the assignment ToR, and confirms the assignment in writing.
4. **Delivery:** IFFEd confirms review points and sign-off procedures for each assignment. IFFEd pays against accepted deliverables. Assignments longer than two months may include milestone payments, agreed in the assignment ToR. Payment follows acceptance of the deliverables by the Director of Education or a delegated staff member.
5. **Indicative pipeline:** The first assignment is expected to be Education, skills and finance analysis for several countries to be commissioned within 1-2 months of contract start. IFFEd expects the volume of work under the framework to grow if the arrangement is extended.

A firm may decline an assignment without consequences for future assignments. Where a firm declines, cannot meet the required timing, or has a conflict of interest, IFFEd may award to the other panel firm or commission the work outside the framework.

IFFEd will review each firm's performance at the end of the base term, based on timeliness, quality of deliverables and responsiveness, recorded after each assignment. IFFEd may suspend or remove a

firm from the panel for unsatisfactory performance, failure to meet agreed deliverables or timelines, or breach of IFFEd's ethics and integrity standards. Extension beyond the base term is at IFFEd's sole discretion and is decided separately for each firm.

7. Intellectual property, confidentiality and data

All products produced under this engagement belong to IFFEd. The firm assigns all intellectual property rights in the deliverables to IFFEd and provides them in editable, reusable form. The firm retains ownership of its pre-existing tools, methods and datasets. Where these are built into a deliverable, the firm grants IFFEd a perpetual, royalty-free licence to use them for its own purposes. The firm will keep all IFFEd information confidential, including pipeline and country data. It will use the information only for this engagement, store it securely, and return or destroy it when the work is finished. These obligations continue after the contract ends. Where an assignment involves primary data collection, the firm will follow recognised research ethics standards, including informed consent and the protection of children and young people.

8. Procurement process and eligibility

This procurement is conducted through open competitive bidding by Request for Proposals, publicly advertised and open to all qualified firms and consortia (government entities; public universities and research institutes are not eligible). A minimum of three responsive proposals is required for an award. If only one proposal meets the technical threshold, IFFEd may appoint a single firm or re-tender. Award is subject to IFFEd's internal approval procedures, including review by the Financial Risk Committee.

Proposals must come in two parts, a technical proposal and a financial proposal, as separate sealed submissions, and IFFEd will evaluate them separately. The technical proposal includes a short case task (see Section 10). IFFEd may request clarifications, interview shortlisted firms, and accept or reject any or all proposals.

Bidders may submit as a single firm or as a consortium and may use subcontractors. A consortium must name the lead firm that will sign and be responsible for the contract. The lead firm is responsible for the work of all consortium members and subcontractors. An individual expert may appear in only one proposal.

The technical proposal should show the breadth and technical capacity of the team proposed in line with the thematic areas (Scope of work). The financial proposal should give daily rates and any general costs, using the template in Annex 1.

This contract does not include work already covered by IFFEd's other arrangements and IFFEd may commission work separately from this contract.

Eligibility and conduct requirements:

- Bidders must comply with IFFEd's standards of ethics and integrity, including its provisions on anti-corruption, financial misconduct and conflict of interest, and must disclose any actual or potential conflict of interest;

- Firms and individuals listed on the UN Security Council (1267) sanctions list, subject to cross-debarment by the multilateral development banks, or listed on the EU sanctions map are ineligible;
- Former and current IFFEd personnel are subject to a six-month cooling-off period and a one-year post-employment restriction on serving as, or being compensated by, a vendor with whom they were personally involved in procurement;
- IFFEd subscribes to the UN Sustainable Development Goals, including fair labour conditions and gender equality, and will reject services supplied through forced or child labour; and
- Bidders must disclose any current contracts with MDBs or governments relating to projects in IFFEd's pipeline or portfolio. IFFEd may exclude a firm from specific assignments where a conflict of interest exists.

A bidder may submit a complaint regarding the process or award to IFFEd management within three working days of notification. IFFEd will assess the complaint and provide a response, which shall be final. IFFEd will not sign contracts before the complaint period has closed.

9. Deadlines and submission

The dates below are indicative and may change. IFFEd will confirm them in the advertisement.

Activity	Date
Advertisement published	13.10.2026
Deadline for bidder questions	25.10.2026
IFFEd responds to questions	06.11.2026
Closing date for proposals	20.11.2026 (17:00 CET)
Notification of award	04.12.2026
Contract start	15.12.2026

Proposals must be submitted in English, in searchable format, to Thomas.poulsen@iff-education.org by the closing date and time above. Late proposals will not be considered. Questions should be sent to (Thomas Poulsen – Thomas.poulsen@iff-education.org) by the question deadline.

10. Proposal contents and evaluation

The technical proposal should set out the firm's team qualifications and document relevant experience across the broad range of possible tasks identified. The technical proposal should include a team of up to 8 experts with CVs including a named team leader. The technical proposal should not exceed 15 pages, excluding CVs and the case task. Each CV should not exceed three pages. The financial proposal should set out the daily rates of each named expert, grouped by role category, and all other general costs that would apply, using the template in Annex 1.

Proposals will be evaluated on the basis of value for money, understood as the best return on investment rather than the lowest price. Technical and financial proposals will be weighed 70 per cent and 30 per cent respectively, against the criteria below. The financial proposal will be opened only for proposals that meet a minimum technical threshold of 45 out of 70; proposals falling below this threshold will not be evaluated.

As part of the technical proposal, bidders will complete a case task: a sample country education, skills and finance analysis for a selected country (the Philippines) of no more than ten (10) pages. The task must show how the firm approaches a country analysis and diagnostic tool in practice – the methodology, application of data and sources, and presentation of findings to a technical and non-technical audience. IFFEd will score the case on methodology and its relevance to IFFEd’s needs, use of data and sources, quality of analysis, and clarity of presentation. The case task remains the property of the bidder and will be used for evaluation only.

Criterion	Weight
Relevant firm experience, in particular comparable country diagnostics at scale	20
Quality and seniority of the proposed team	20
Sample country analysis (case task, see above)	30
Technical subtotal	70
Financial proposal	30
Total	100

The financial proposal will be scored against the notional assignment in Annex 1. IFFEd will apply each bidder’s daily rates to a fixed level of effort by role category and add any general costs declared. The result is the notional price. The notional price is used for evaluation only and does not commit IFFEd to any volume of work.

The financial score is calculated as follows: financial score = $30 \times (\text{lowest notional price} \div \text{bidder's notional price})$.

Where a role category includes more than one named expert, IFFEd will use the simple average of their daily rates. General costs expressed as a percentage are applied to the fee total. IFFEd may ask a bidder whose notional price is more than 30 per cent below the median of responsive proposals to justify its rates, and may reject the proposal if the justification is not satisfactory.

Annex 1. Financial proposal template

Bidders complete Tables A and B. IFFEd completes Table C during evaluation. All amounts are in US dollars and inclusive of taxes. Travel and other task-specific costs are excluded; they are agreed per assignment.

Role categories

Category	Definition
Team Leader	Named team leader. At least 15 years of relevant experience, including leading multi-country analytical assignments.
Senior Expert	At least 10 years of relevant experience in one or more of the areas in Section 5.
Mid-level Expert	5 to 10 years of relevant experience.
Analyst	Up to 5 years of relevant experience. Data, research and drafting support.

Table A. Daily rates by named expert

Role category	Name of expert	Daily rate (USD, incl. taxes)
Team Leader		
Senior Expert		
Senior Expert		
Senior Expert		
Mid-level Expert		
Mid-level Expert		
Analyst		
Analyst		

Bidders may propose up to 10 experts.

Table B. General costs in addition to fees

Description	Basis (% of fees or fixed amount)	Amount

Enter “none” if no general costs apply. Costs not declared here cannot be charged under the framework agreement.

Table C. Notional assignment (for evaluation only)

Role category	Notional days	Rate (USD, average per category)	Subtotal (USD)
Team Leader	10		
Senior Expert	25		
Mid-level Expert	35		
Analyst	30		
Total fees	100		
General costs (Table B)			
Notional price			

The notional assignment reflects the expected first call-down: an education, skills and finance analysis for several countries. It is used to compare financial proposals on a like-for-like basis. It does not represent a commitment by IFFEd to commission this or any other volume of work.