

Terms of Reference

Design and Delivery of an Internal Learning Workshop on EU Accession Process

1. Background of the assignment

Helvetas is a leading Swiss organization for development cooperation and humanitarian response – denominationally neutral and politically independent. As an association with a strong membership base in Switzerland, the organization is committed to a fairer world worldwide. Helvetas supports disadvantaged people and communities in low- and middle-income countries who want to actively improve their living conditions.

Helvetas Eastern Europe Regional Office is active in 11 countries across Eastern Europe encompassing the Eastern Partnership and the Western Balkans. The regional office is committed to enabling systemic change that creates fair opportunities and stronger communities across the regions. Helvetas Eastern Europe focuses on four key areas: Good Governance, Economic Perspectives, Green Transition, and Humanitarian Response.

In partnership with the Swedish International Development Cooperation Agency (Sida), Helvetas is leading a regional inclusive economic development program, RECONOMY, in 11 countries in Eastern Partnership (Armenia, Azerbaijan, Georgia, Ukraine, Moldova), and the Western Balkans (Kosovo, North Macedonia, Albania, Montenegro, Serbia, and Bosnia and Herzegovina). While the program is considered one for the targeted countries, the thematic focus for Western Balkans and Eastern Partnership countries slightly differs based on the economic and political dynamics of the region. What unites the program is the vision for change aiming at inclusive and green economic opportunities that build on common problems and common opportunities for the target group – women and youth, including the most disadvantaged and excluded.

Given the European Union's (EU) decisive role as a key donor, trade partner, and political actor in both RECONOMY's regions, it is essential for RECONOMY team members to deepen their knowledge of the EU institutional framework, legislative processes, enlargement and accession criteria, and negotiation dynamics. This knowledge is particularly relevant for program activities in candidate and potential candidate countries of the Eastern Partnership and Western Balkans. Therefore, **to strengthen these capacities, RECONOMY is seeking the services of a qualified consultancy in designing and delivering an internal workshop on EU Accession Process, tailored to its team.**

2. Objectives and Scope of the Assignment

2.1 Objective

Overall objective of the assignment is to design and deliver a training that equips primarily RECONOMY staff and more broadly Helvetas Eastern Europe regional team with knowledge and competencies to navigate EU political, economic, legislative and institutional dynamics, its enlargement and accession processes, and to translate these insights into programmatic, fundraising and partnership decisions.

Specific objectives:

- Provide a comprehensive understanding of the EU enlargement and accession process.
- Clarify criteria, institutional actors, and technical aspects (benchmarking, screening, financial instruments), Increase awareness of political debates and challenges surrounding accession.
- Highlight the implications of future enlargements on EU policies, institutions and development cooperation
- Facilitate reflection on how EU dynamics relates to RECONOMY's and more broadly Helvetas Eastern Europe Office strategic priorities

Topics to be covered:

- **EU as a political actor** in the global and regional context,
- The historical and geopolitical dimensions of EU enlargement.
- **EU enlargement policy**, including the revised enlargement methodology and the six clusters of negotiation chapters.
- **EU accession process and criteria**, including institutional actors, decision-making processes, and negotiation dynamics. And Technical aspects such as benchmarking, screening and financial instruments.
- **Highlight the implications** of EU accession and pre-accession processes for partner countries and development cooperation.
- **The Western Balkans'** stalled accession process and shifting EU priorities.
- The geostrategic implications of **Ukraine, Moldova, and Georgia's candidacies**.
- **A case study on Kosovo**, examining the EU's approach to engagement.
- Facilitate dialogue, reflection, and **link EU dynamics to RECONOMY's and more broadly to Helvetas' strategic priorities** and regional programming.

2.2 Scope of Work

The service provider will deliver full-cycle training split into design, delivery, and follow-up stages. Specifically:

Design phase

- **Rapid needs assessment to tailor the scope (depth and breadth) of training to RECONOMY and more broadly to Helvetas Eastern Europe mandate, focus areas, and priorities.** Needs assessment will be implemented by a joint call or separate short, three to four interviews with RECONOMY core team and Helvetas Eastern Europe regional team representatives. An online survey tool, in addition to interviews, might also be used.
- **Develop a tailored workshop concept and agenda** in consultation with RECONOMY core team and Helvetas regional team, with preparatory reading materials, links to short educational or informative videos, necessary EU taxonomy, etc.
- **Design workshop delivery toolkit** to include a mix of lectures, interactive and practical tools, reflection sessions. Prepare training materials, case studies, and reading resources adapted to the needs of professional audience in development cooperation.

Delivery phase

- **Facilitate an interactive learning workshop** (one full day equivalent delivered in 4 separate two-hour online sessions).
- **Use participatory and adult learning methodologies** (case discussions, group work, simulations, Q&A) to ensure engagement and learning.
- **Case examples** from candidate and potential candidate countries, including countries from the Western Balkans and the Eastern Partnership.

Follow-up phase

- **Submit a concise workshop report** summarizing content delivered, key discussions, learning points, and recommendations for future learning topics.
- **Share all training materials and references** with RECONOMY for internal use.

3. Deliverables

The service provider is responsible for delivering the following:

1. **Needs Assessment Brief:** (Due within 2 weeks of contract signing) describing the main findings of the needs assessment and suggested priorities for the workshop.
2. **Concept, Agenda and Training Toolkit:** (Due within 4 weeks of contract signing) a detailed training agenda, clearly describing the sessions, their objectives, learning outcomes and tools and instruments used for each session.
3. **Workshop Delivery:** One full day equivalent delivered in 4 separate two-hour online sessions
4. **Follow-up Brief and Training Materials:** Concise summary (maximum 10 pages) of key findings. Learning points and actionable recommendations tailored for RECONOMY and Helvetas Eastern Europe regional team. Full package of training materials.

4. Timeline and Level of Effort

No	Activity	Timeline	Payment terms
1	Needs Assessment Brief	1 week after signing the contract	1 st payment
2	Concept, Agenda and Training Toolkit	3 weeks after signing the contract	
3	Workshop Delivery	Within two months after signing the contract	2 nd payment
4	Follow-up Brief and Training Materials	Within two months after signing the contract	3d payment

The consultancy shall take place between **November – December 20th, 2025**.

All the work related to this assignment will be conducted remotely. All logistical costs (if applicable) will be covered by the program in accordance with the approved activity plan.

5. Expertise Required

The consultancy company should demonstrate the following expertise and experience:

- **Proven experience** in designing and delivering training on EU accession process, including EU *acquis communautaire* and its chapters to the development organizations, state organizations or similar actors.
- In-house or affiliated **pool of key experts** demonstrating ability to cover the scope of the assignment.
- Proven track record of consulting candidate countries or potential candidate countries on the accession process is **an advantage**.
- Good institutional understanding of political, economic and environmental context of the Western Balkan and Eastern Partnership countries, evidenced by track record of implemented projects.
- Proven excellent analytical, report writing, and presentation skills of the experts.

6. Technical Proposal

In the Technical Proposal, the consultancy company should describe:

- **Profile:** Provide a brief overview of the organization/consultancy company, including name, location, size, and any key information that showcases the presence and history of the company/organization relevant for this assignment.
- **Proposed Methodology, Approach, and Implementation Plan:** Describe the methodology and approach to prepare, design and implement the assignment.
- **Experience:** Present the consultancy company's experience in meeting the required expertise as described in Section 5.
- **Team Expertise:** Describe the qualifications and experience of the consultant team assigned to the engagement. The CVs should highlight the relevant expertise and experience that make the team suitable for the assignment.
- **References:** Present 3 references that demonstrate a successful performance of the consulting company in similar assignments.

7. Financial Proposal

Applicants shall submit a detailed budget for implementing the assignment. The financial proposal should adhere to the structure provided below. **The total budget should not exceed CHF 15,000.**

No.	Deliverables	Number of expert days	Total Fee
			(CHF)
1.	Needs Assessment Brief		
2.	Concept, Agenda and Training Toolkit		
3.	Workshop Delivery		
4.	Follow-up Brief and Training Materials		
TOTAL (tax included)			