

## **ANNEX 2: Terms of Reference**

### **A. Project title**

#### **Strengthening Governance and Management of the UNESCO Man and Biosphere (MaB) Tara River Basin**

### **B. Project Description**

#### **1. Context and Rationale**

The Tara River Basin has been designated as a UNESCO Man and Biosphere (MaB) Reserve since 1977, with the overarching objective of promoting a balanced relationship between people and nature through the integration of biodiversity conservation, sustainable development, and knowledge exchange. Despite its long-standing designation and high ecological, economic and cultural value, the Reserve has not developed a fully functional governance and management system that meets UNESCO standards or effectively operationalises its mandate on the ground. As a result, significant efforts are required to establish a coordinated, sustainable, and institutionally embedded framework capable of delivering on the MaB functions.

Initial steps towards governance were undertaken in 2017, when a Coordinating Body was established with representatives from all municipalities within the Reserve and an Action Plan was endorsed. However, this structure did not become operational due to limited institutional support, insufficient political commitment, and lack of dedicated resources. Consequently, the mechanism remained largely inactive and did not evolve into a sustainable governance model.

Through the ongoing GEF-7 project, the Coordinating Body has recently been re-established, now including representatives of municipalities and protected area authorities, alongside the creation of a dedicated Secretariat. While this represents an important step forward, both the Coordinating Body and the Secretariat are at an early stage of development and require substantial support to become functional, effective, and sustainable entities. In particular, the Secretariat currently lacks the institutional capacity, operational procedures, and strategic tools necessary to act as a proactive coordination and implementation platform.

At present, governance structures remain limited in scope, as they do not adequately include representatives from the civil society sector and private sector so there is a clear need to strengthen stakeholder engagement mechanisms and to broaden participation in governance, ensuring that local communities, entrepreneurs, and other relevant actors are actively involved.

The Tara River Basin is also facing a range of development pressures and environmental challenges, including unplanned construction, infrastructure expansion, abandonment of traditional land-use practices, and increasing impacts of climate change such as wildfires, droughts, and extreme weather events. The current coordination mechanism is not adequately equipped to address these challenges or to facilitate balanced, participatory, and conflict-sensitive solutions that align with UNESCO principles. Strengthening governance capacities to respond to such pressures in an integrated and adaptive manner is therefore a priority.

A critical gap is the absence of a structured system for identifying, developing, and managing projects and funding opportunities. Financial sustainability is a cornerstone of effective biosphere reserve management, yet the Coordinating Body and Secretariat currently lack the capacity to develop a pipeline of project ideas, prepare competitive proposals, and engage in strategic partnerships. There is a need to build their ability to proactively access funding, mobilise resources, and position the biosphere reserve as a credible partner in national and international programmes.

In addition, the institutional and legal status of the Coordinating Body and Secretariat remains unclear and not fully suited to accessing and managing external funding. It is necessary to assess and define the most appropriate legal and organisational model that would enable the body to function effectively, including acting as a grant beneficiary. This may include exploring options for its evolution towards a Local Action Group (LAG)-type structure, or a similar mechanism, in line with the EU LEADER approach and other relevant models that support integrated territorial development.

This assignment aims to address these challenges by establishing the enabling conditions for a functional, sustainable, and institutionalised governance system for the Tara River Basin Biosphere Reserve. It will focus on strengthening the Coordinating body and the Secretariat, clarifying governance arrangements, and developing key strategic, operational, and financial frameworks necessary for effective management.

The assignment will support the development of a comprehensive governance and management framework, including a clear vision, an Action Plan aligned with UNESCO MaB functions, operational protocols, a monitoring and evaluation framework to support adaptive management, and a business plan to ensure financial sustainability. In parallel, it will provide hands-on support for identifying funding opportunities and preparing project proposals, while building the capacity of the Secretariat to independently manage a project pipeline in the future, as well as increase the capacities of the Secretariat to report on MaB operations in accordance with the UNESCO requirements.

Finally, the assignment will place strong emphasis on stakeholder communication, engagement, and awareness-raising, with the aim of strengthening local ownership of the biosphere reserve concept and ensuring that governance structures are inclusive, participatory, and widely supported.

## **2. Overall Objective of the Project**

The overall objective of this assignment is to strengthen the governance, institutional capacity, and operational sustainability of the MaB Reserve Tara River Basin by establishing a functional, participatory, and institutionalised governance and management mechanism aligned with UNESCO Man and Biosphere (MaB) principles and requirements, capable of effectively supporting coordinated governance, strategic and operational planning, sustainable financing, stakeholder engagement, monitoring and adaptive management, and implementation of the objectives of the UNESCO Man and Biosphere Programme.

### Specific Objectives

- Establish a functional, participatory, and legally grounded governance and management mechanism for the MaB Reserve Tara River Basin, with clearly defined institutional roles, responsibilities, coordination procedures, and decision-making processes aligned with UNESCO MaB principles and requirements
- Strengthen the institutional and operational capacities of the Coordinating Body and Secretariat to effectively perform governance, coordination, planning, reporting, stakeholder engagement, and project development functions
- Develop strategic and operational planning frameworks for the biosphere reserve, including a shared vision, Action Plan, operational procedures, monitoring and evaluation framework, and systems for adaptive and evidence-based management
- Establish practical systems and procedures for data and knowledge management, monitoring, and UNESCO MaB reporting, enabling systematic collection, management, analysis, and use of information for decision-making and reporting purposes
- Strengthen participatory governance and stakeholder engagement by ensuring structured involvement of municipalities, protected area managers, local communities, civil society, private sector actors, and other relevant stakeholders in governance and planning processes
- Enhance communication, visibility, and public awareness of the MaB Reserve Tara River Basin through development of communication tools, outreach activities, and mechanisms that strengthen stakeholder participation and local ownership of the biosphere reserve concept

- Strengthen capacities for financial sustainability and resource mobilisation through development of a business plan, identification of funding opportunities, establishment of project development procedures, and preparation of project concepts and funding proposals
- Support the long-term sustainability and resilience of the biosphere reserve governance system by promoting integrated approaches that balance biodiversity conservation, sustainable development, and local socio-economic needs in accordance with UNESCO MaB functions

Overall, the assignment seeks to create the enabling conditions for a resilient, inclusive, and self-sustaining governance system for the Tara River Basin UNESCO Biosphere Reserve, capable of balancing biodiversity conservation with regional development and delivering measurable long-term benefits for both nature and local communities.

### **C. Scope of Work**

The selected Service Provider (Company) shall be responsible for providing overall technical leadership, coordination, and quality assurance for the following tasks:

#### **Inception phase and groundwork**

- Conduct an inception phase to establish a clear understanding of the assignment context, including review of all relevant documents, initiatives, and stakeholders related to the MaB Reserve Tara River Basin
- Define methodology and implementation approach for all tasks, including sequencing, tools, and stakeholder engagement methods

#### **Governance strengthening**

- Conduct an assessment of the current institutional, legal, and operational framework of the MaB Coordinating Body and its Secretariat, and propose a legally grounded, operationally feasible and sustainable governance mechanism, including an optimal legal status, with clearly defined roles, responsibilities, and decision-making structures
- Define the proposed operational model of the governance mechanism, including institutional relationships, membership structure, representation of relevant stakeholders, coordination procedures, financing arrangements, accountability mechanisms, and operational functions of the Secretariat
- Develop a roadmap for institutional strengthening and formalisation of the Coordinating Body and Secretariat, including concrete steps, timelines, and milestones for establishing a functional governance mechanism. The roadmap should assess the feasibility and added value of evolving towards a Local Action Group (LAG)-like structure in line with the EU LEADER approach
- Prepare a detailed operational work plan for the Coordinating Body and Secretariat, including annual priorities, activities, responsibilities, coordination arrangements, and operational procedures necessary for effective implementation of the biosphere reserve mandate
- Develop a package of operational protocols and supporting documents, including procedures for coordination and decision-making, stakeholder engagement and participation, communication and visibility, and data and information sharing

#### **Strategic and operational planning**

- Facilitate a participatory process to develop a shared vision for the MaB Tara River Basin, ensuring alignment with UNESCO MaB functions and stakeholder priorities
- Develop an Action Plan for the MaB Tara River Basin as a core management document, including strategic and operational objectives, priority measures and actions, clearly assigned roles and responsibilities, implementation timeline, measurable indicators, financial needs and funding sources, monitoring and evaluation framework, and a resource mobilisation strategy for implementation

- Prepare, jointly with the Secretariat and Coordinating Body, the required periodic report and other reporting obligations related to the UNESCO MaB Programme, including collection, consolidation, and organisation of relevant data and supporting documentation
- Strengthen the capacities of the Secretariat and Coordinating Body for future UNESCO MaB reporting through a learning-by-doing approach, including development of reporting procedures, data collection and management processes, and practical guidance for preparation of periodic reports and related documentation
- Design and support the establishment of a practical, user-friendly data and knowledge management system for the biosphere reserve, using readily available software solutions (no custom software development required)
- Develop clear procedures and protocols for data collection, storage, sharing, and analysis
- Provide hands-on training to the Secretariat and Coordinating Body members on the use and maintenance of the data and knowledge management system and data-sharing processes

### **Capacity building and institutional strengthening**

- Strengthen capacities of the Secretariat and Coordinating Body in strategic and operational planning, business planning, financial sustainability, resource mobilisation, and fundraising through learning-by-doing approach and practical exercises
  - Design and implement a training for members of the Coordinating Body and Secretariat, covering UNESCO MaB principles, governance standards and adaptive management
  - Deliver specialised training for Coordinating Body members, municipalities, protected area managers, and other stakeholders on the following topics:
    - community engagement and conflict resolution,
    - participatory planning and decision-making and co-management approaches,
    - managing development pressures (such as tourism and infrastructure) in line with UNESCO principles

### **Resource mobilization**

- Develop a business plan for the Coordinating Body/Secretariat to ensure long-term operational sustainability, including identification of funding sources, co-financing mechanisms (including municipal contributions), and potential revenue streams
- Establish a structured system for identification, development, prioritisation, and management of project ideas, building on the findings, priorities, and measures identified through the governance assessment, Action Plan, stakeholder consultations, and other processes, in order to ensure coherence and avoid duplication of activities
- Prepare a pipeline of priority project concepts aligned with the biosphere reserve Action Plan, including identification of suitable funding sources for each concept
- Develop standard procedures and practical guidance for project preparation and submission, including internal coordination, partner engagement, and proposal development processes for the Secretariat and Coordinating Body
- Provide hands-on support in the preparation and submission of at least two project proposals to relevant national or international funding programmes

### **Participatory governance and stakeholder engagement**

- Facilitate a series of structured stakeholder consultations with local communities, municipalities, institutions, private sector and civil society actors to strengthen participation in governance structures, contribute to the development of the shared vision, and validate key outputs
- Identify and map existing participatory platforms and engagement mechanisms (such as thematic working groups, local forums, stakeholder workshops, fairs, and youth initiatives), and define practical approaches for leveraging them to support the MaB Reserve, and strengthen Reserve outreach, stakeholder participation, and local ownership
- Develop and operationalise a communication and awareness-raising framework for the MaB Reserve, including a visibility strategy, annual events calendar, communication tools, and outreach activities to strengthen public awareness, stakeholder engagement, and local ownership

#### D. Expected Outputs and Deliverables

The Company shall deliver the outputs and specific deliverables listed below in a logical sequence aligned with the process. Indicative timeframes are expressed as periods counted from the date of contract signing. Exact dates shall be confirmed in the approved Inception Report. All deliverables shall be subject to technical review and validation by the Implementing Entity and formal contractual acceptance in accordance with the agreed institutional arrangements.

<b>Deliverable / Output</b>	<b>Description</b>	<b>Indicative Timing</b>	<b>Review and Approval</b>
Inception Phase and Methodological Framework	Inception Report, including methodology, detailed work plan, stakeholder mapping, and implementation approach	Within 4 weeks of contract signing	IP
Institutional Assessment and Governance Framework	Assessment Report on Institutional, Legal, and Operational Framework of the Coordinating Body and Secretariat, including proposal for a sustainable governance mechanism and legal status and a roadmap for Institutional Strengthening and Formalisation, including development of a LAG-like mechanism	Month 2	IP
Operational Framework and Internal Procedures	Operational Work Plan for the MaB Coordinating Body and Secretariat  Operational Protocols and Strategic Documents Package, including coordination and decision-making procedures, stakeholder engagement mechanisms, communication and visibility framework, and data and information sharing procedures	Month 3	IP
Strategic Vision and Action Planning	Vision for the MaB Tara River Basin (developed and validated through participatory process)  Action Plan for the MaB Tara River Basin, aligned with UNESCO MaB functions, including implementation, monitoring and evaluation, and resource mobilisation framework	Month 7	IP
Data Systems and Capacity Development	Data and Knowledge Management System, including system design, procedures for data collection, storage, sharing and analysis, and evidence of system being operational  Capacity Building Programme and Training Materials and Report on Capacity Building Activities, including training delivery and outcomes	Month 7	IP

<b>Deliverable / Output</b>	<b>Description</b>	<b>Indicative Timing</b>	<b>Review and Approval</b>
Resource Mobilisation and Financial Sustainability Framework	Business Plan for the Coordinating Body/Secretariat, including financial sustainability and funding mechanisms  Project Development and Resource Mobilisation Framework, including procedures and tools for project pipeline development  Project Pipeline and Funding Opportunities Report, including prioritised project concepts aligned with the Action Plan	Month 7	IP
Project Development and Submission	At least two Project Proposals prepared and ready for submission to relevant funding programmes	Month 7	IP
Participatory Governance and Communication Framework	Stakeholder Consultation and Engagement Report, including mapping of existing platforms and recommendations for their use  Communication and Awareness-Raising Framework, including visibility strategy, events calendar, and outreach tools	Month 7	IP
Reporting	UNESCO MaB Periodic Report and Supporting Documentation Package, prepared jointly with the Secretariat and Coordinating Body  Final Consolidated Report, including summary of activities, key results, recommendations, and lessons learned	Month 8	IP

Total estimated duration: 8 months

## **D.2 Quality Standards**

All deliverables shall:

- Be prepared in English (unless otherwise agreed);
- Integrate inputs from international and national experts into a single coherent proposal; and

## **D.3 Review and Acceptance**

Each deliverable shall be reviewed within an indicative period of up to ten (10) working days following submission. The Company shall address comments and revise deliverables within timeframes agreed with the IP. Formal acceptance of deliverables shall be confirmed in writing by the designated approving authority.

## **E. Institutional Arrangement**

### **Institutional oversight and reporting lines**

The contract shall be administered and managed by Ministry of Ecology, Sustainable Development and Northern Region, which shall retain overall contractual authority, including contract supervision, performance monitoring, and formal acceptance of deliverables.

All key deliverables shall be subject to joint review by Ministry of Ecology, Sustainable Development and Northern Region and UNDP, with final contractual acceptance and payment authorization resting with Ministry of Ecology, Sustainable Development and Northern Region.

### **Contractor Management Structure**

The Company shall designate a Project Manager who shall serve as the primary operational point of contact with IP. The Project Manager shall be responsible for:

- overall coordination of project activities;
- day-to-day communication with stakeholders;
- monitoring implementation progress;
- ensuring timely delivery of outputs;
- quality assurance of all deliverables.

The Company shall establish an appropriately qualified Project Team responsible for the execution of technical and substantive tasks under this assignment.

### **Progress Reporting**

The Company shall submit monthly progress reports to IP.

Each report shall include, at a minimum:

- summary of activities performed;
- progress against milestones;
- risks and challenges encountered;
- mitigation measures;
- planned activities for the next reporting period.

IP may request ad-hoc briefings or presentations on project progress as required.

### **F. Duration of the Work**

#### **a) Duration of the assignment**

The assignment is expected to be implemented over a fixed-term period, with a clearly defined start and end date, and an estimated overall duration of approximately 8 months, taking into account the scope, complexity and phased delivery of outputs.

#### **b) Start date and expected completion**

The assignment is expected to commence within two (2) weeks of contract signing, subject to the completion of contractual formalities and the availability of initial inputs and documentation.

The expected completion date is set at approximately 10 months from the commencement date, in line with the agreed scope of work and the phased delivery of outputs.

Any adjustments to the start date or completion timeline may be agreed in writing between IP and the Company where external factors — such as delays in data availability, regulatory changes or force majeure events — materially affect the implementation schedule.

#### **c) Review, feedback and acceptance of deliverables**

For each deliverable submitted under the assignment, an estimated review and approval period of up to ten (10) working days shall apply.

During this period, UNDP may provide comments, requests for clarification or requests for revisions. The Company shall address such comments within a timeframe to be agreed with the Project Implementing Partner. Formal acceptance of each deliverable shall be confirmed in writing by the designated approving authority.

#### **d) Time sensitivity and implications of delays**

The assignment is considered time-sensitive.

Any significant delay in the completion of the assignment may adversely affect the sequencing of subsequent project phases, the timely achievement of regulatory objectives, and the overall effectiveness of supervisory processes.

### **H. Qualifications of the Successful Individual Company**

The selected Company must demonstrate the technical, organizational, and financial capacity required to

successfully lead and coordinate the preparation of an financial plans in accordance with the ToR standards.

### **H.1 Corporate Registration and Relevant Experience**

The Company must be a legally registered entity authorized to provide professional consulting services in fields relevant to biodiversity conservation and finance, climate change adaptation, climate finance, disaster risk reduction, environmental and social safeguards, or related disciplines.

### **H.2 Technical and Organizational Capacity**

The Company shall demonstrate strong technical leadership, coordination, and delivery capacity for complex, multi-component assignments related to governance, institutional strengthening, and territorial development. This includes:

- Proven ability to manage and deliver multidisciplinary assignments involving governance reform, strategic planning, capacity building, and stakeholder engagement
- Experience coordinating teams of international and national experts, ensuring effective collaboration and timely delivery of outputs
- Demonstrated capacity to lead participatory processes involving public institutions, local communities, private sector, and civil society actors
- Strong project management and organisational skills, including the ability to deliver high-quality outputs within defined timelines
- Established internal quality assurance mechanisms to ensure consistency, methodological rigor, and technical soundness of all deliverables

The Company must demonstrate in-house expertise or access to qualified experts in the following areas:

- Governance and management of biosphere reserves, protected areas, or similar multi-stakeholder territorial frameworks
- UNESCO Man and Biosphere (MaB) programme, including its governance, planning, and reporting requirements
- Institutional strengthening and development of governance mechanisms, including legal and organisational models and participatory, multi-level governance structures
- Strategic planning, action planning, and development of operational frameworks, including monitoring and evaluation systems
- Development of sustainable financing models, including business planning, financial sustainability, and resource mobilisation mechanisms
- Project development, including preparation of project pipelines and high-quality proposals for international donors and funding programmes
- Stakeholder engagement, participatory governance, facilitation of consultations, and conflict-sensitive approaches
- Design and delivery of capacity building programmes and applied, practice-oriented training
- Data and knowledge management systems, including practical, user-friendly approaches for data collection, sharing, and use in decision-making

The following experience will be considered an advantage:

- Experience in sustainable tourism development and balancing conservation and socio-economic development in sensitive areas
- Experience with the EU LEADER approach, Local Action Groups (LAGs), or similar territorial development mechanisms
- Experience working in Montenegro or the Western Balkans region, including familiarity with institutional context and stakeholder landscape

### **H.3 Human Resources and Key Personnel**

The Company shall propose a **core expert team**, contracted under the Company, at a minimum including:

- Team Leader / Governance and Institutional Development Expert
- Strategic Planning and Management Expert
- Resource Mobilisation and Business Planning Expert
- Participatory Governance and Stakeholder Engagement Expert
  
- Optional:
- Data and Knowledge Management Expert
- Legal expert
- Communication, outreach and visibility expert

Key experts shall have:

- A university degree in a relevant field (e.g. sustainable development, environmental sciences, natural resource management, public administration, regional development, governance, economics or related disciplines);
- A minimum of 7 years of professional experience relevant to the assignment for the Team Leader and 5 years for other key experts, including governance of protected areas or biosphere reserves, institutional strengthening, territorial development, multi-stakeholder coordination mechanisms, resource mobilisation and project development, business planning and financial sustainability, participatory governance and stakeholder engagement capacity building and training delivery, data and knowledge management systems
- Demonstrated experience in strategic planning, development of action plans, and operational frameworks, including monitoring and evaluation systems
- Strong experience in facilitating participatory processes involving public institutions, local communities, private sector, and civil society, including conflict-sensitive approaches and inclusive decision-making
- Experience in preparation of project proposals and engagement with international funding programmes and donors
- Excellent analytical, communication, and reporting skills, with demonstrated ability to produce high-quality technical deliverables
- Experience working in multidisciplinary teams and contributing to coordinated delivery of complex assignments

The following will be considered an advantage:

- Experience with UNESCO Man and Biosphere (MaB) programme
- Experience with EU LEADER approach, Local Action Groups (LAGs), or similar territorial development models

The Company shall demonstrate its capacity to ensure continuity of services throughout the contract period. Where third-party experts or short-term consultants are engaged, the Company shall retain full responsibility for coordination, quality, and timely delivery of outputs.

### **H.4 Financial and Legal Capacity**

The Company must demonstrate adequate financial and legal standing to perform the contract, in accordance with applicable procurement requirements. Documentary evidence of financial capacity and legal eligibility shall be provided as part of the proposal submission.

The Company must not be subject to any legal, financial, or contractual restrictions that would prevent it from fulfilling the obligations under this assignment.

### **H.5 Ethical Standards and Compliance**

The Company shall comply with applicable ethical standards, including:

- Integrity and transparency in professional conduct;
- Absence of conflicts of interest;

- Commitment to gender equality, inclusiveness, and respect for environmental and social safeguards. The Company shall confirm its willingness to comply with the policies, procedures, and contractual requirements of the contracting authority and the Implementing Entity.

**J. Recommended Presentation of Offer**

As requested in the RFP

**K. Criteria for Selection of the Best Offer**

As described in the RFP