

TERMS OF REFERENCE (TOR) FOR INSTITUTIONAL CONTRACTORS**International Institutional Consultancy for the development of the costed Education Reform Strategy Action plan, Medium Term Expenditure Framework, HR Analysis of Teachers and education professionals in Montenegro, and design and delivery of capacity building programme****1. Background and Context**

Following the adoption in April 2025 of the comprehensive [Education Reform Strategy \(2025 – 2035\)](#), along with the Action Plan for 2025 - 2026, the Ministry of Education, Science, and Innovation has been investing extensive efforts to tackle in a systemic manner the multiple issues affecting the education system: the long lasting teaching and learning crisis, scarce opportunities for students to develop 21st century skills, limited access to quality education for children and adolescents from vulnerable groups, and inadequate school infrastructure.

The Strategy encompasses four key goals:

1. Enhancing the quality, equity, and resilience of the education system
2. Ensuring that all teachers are well-supported and equipped to work in a 21st century classroom
3. Enhancing the governance and financing of the education system
4. Expanding and improving school and digital infrastructure

A Functional Review of the Ministry of Education, Science, and Innovation was conducted in parallel with development of the new Strategy, with an aim to improve overall governance of the education system and ensuring quality and timely implementation of the commitments set in the new Education Reform Strategy (2025 – 2035), the Montenegro Reform Agenda, obligations coming through Youth Guarantee, European Child Guarantee, and the forthcoming opportunities under the multi-sectoral, ESF funded Programme for Employment, Education, Health Care and Social Inclusion. In this context, emphasis is placed on translating strategic priorities into concrete measures, in line with the Reform Agenda and Growth Plan for the Western Balkans, with focus on strengthening institutional capacities for strategic management and evidence-based policymaking.

Therefore, based on the Functional Review recommendations, a new MoESI Directorate for Strategic Management and Career Orientation is being established.

However, to achieve this goal, strengthening institutional and operational capacities within MoESI and other central educational institutions (Bureau for Education, Centre for Vocational Education, Examination Centre, and Textbooks Publishing Agency) will remain essential in 2026 and 2027 to create and enhance capacities for evidence-based policymaking, improve the efficiency of budgetary processes, with focus on reinforcing coordination and intersectoral cooperation.

This assignment will focus on developing a new budgeted Education Reform Strategy Action Plan for the three-year period from 2027 to 2029, alongside a Medium-Term Expenditure Framework to ensure sustainable financing of reform measures. Additionally, a key component of the assignment is the strengthening of institutional capacities within the Ministry and central education institutions, particularly in the areas of strategic planning, programme design, coordination, monitoring and evaluation, and management of EU funds. This is expected to be achieved through a structured and practice-oriented capacity-building programme, developed based on the findings of the Functional Analysis and implemented in close cooperation with relevant national and international partners. The assignment will contribute to advancing Montenegro's EU integration agenda by supporting the fulfilment of key recommendations of the European Commission in the education sector and strengthening the institutional framework required for effective policy implementation. It will support the implementation of commitments under the Reform Agenda and the EU Growth Plan for the Western Balkans,

particularly those related to improving governance, strategic planning, public expenditure management, and the quality and inclusiveness of education.

Furthermore, the quality and sustainability of Montenegro's education system depend on the availability, qualifications, and effective deployment of teachers and education professionals. As Montenegro advances the implementation of the Education Reform Strategy 2025–2035, there is an increasing need for strategic human resource planning to ensure that the education sector is equipped to meet current and future demands. A major step toward evidence-based workforce management was the establishment of the Database of Teaching Staff and Education Professionals within the Montenegro Education Information System (MEIS). This comprehensive database provides reliable and up-to-date information on the education workforce, creating the foundation for informed policy-making and long-term planning. It also enables a systematic approach to addressing teacher shortages and ensuring that enough qualified professionals are available across different levels of education, subject areas, and geographic regions. Prior to that, Education Sector Analysis 2015-2020¹ has already identified significant gaps in human resources data, noting that existing information on teachers is incomplete and insufficient for evidence-based workforce planning, highlighting the need for integrated datasets and a comprehensive baseline analysis. It also revealed several workforce challenges, including an ageing teaching population, uneven distribution of staff across regions, shortages of specialized professionals such as school psychologists, and qualifications that are not always aligned with European standards, underscoring the need for regular monitoring and forecasting of future staffing needs. Furthermore, while the systems for teacher education and professional development are well established, the analysis found that reforms are needed to strengthen initial teacher preparation, improve the effectiveness and relevance of professional development, and ensure that teachers acquire the competencies required for modern teaching and learning.

Full scope of assignment is to be implemented at the national level and targets the Ministry of Education, Science, and Innovation, its newly established and existing directorates, and central education institutions such as the Bureau for Education, Centre for Vocational Education, Examination Centre, and the Institute for Textbooks and Teaching Aids. It is also closely linked with other public administration bodies responsible for governance and human resource management.

The services to be provided under this assignment include technical assistance for development and delivery of a series of at least six training sessions, over the course of the assignment, in areas related to strategic planning, program design, coordination, monitoring and evaluation, EU funds management. Capacity-building measures will particularly target to the Directorate for Strategic Management and Career Orientation, and the Directorate for International Cooperation, European Integration and EU Funds. Furthermore, this is expected to result in the development of a new budgeted Education Reform Strategy Action Plan for 2027 – 2029, and a Medium-Term Expenditure Framework, to ensure implementation of the Action Plan through adequate financing from the state budget and other funding sources. It is expected to be delivered through blended method - combine theoretical learning with hands-on practical work, ensuring that participants not only understand the concepts but also apply them directly.

Furthermore, assignment includes development of a comprehensive human resources analysis of teachers and education professionals in Montenegro assessing workforce demographics, ageing and retirement trends, qualifications, geographic distribution, teacher supply and demand, and current and projected staffing gaps, etc and providing evidence-based recommendations to support workforce planning, teacher recruitment and retention, and the implementation of the Education Reform Strategy 2025–2035.

¹ <https://www.unicef.org/montenegro/media/22591/file/ESA%20-%20ENG.pdf>

This assignment is part of the EU supported project Quality Education for All Children in Montenegro, implemented by UNICEF in partnership with the Ministry of Education, Science and Innovation.

2. Objectives, Purpose & Expected Results

The assignment aims to support the effective implementation of the Education Reform Strategy (2025–2035) by developing a costed Action Plan for 2027–2029 and a Medium-Term Expenditure Framework, while strengthening institutional capacities for strategic management, coordination, and evidence-based policymaking within the Ministry of Education, Science, and Innovation and central education institutions. It will also include development of a comprehensive human resources analysis of teachers and education professionals in Montenegro. Specifically, the objectives are, to:

- a) Design and prepare for Government adoption of a fully budgeted and operational Action Plan for 2027–2029 and Medium –Term Expenditure Framework
- b) Build the capacities of key directorates across MoESI and central educational institutions through a designed, structured programme of at least six training modules delivered over the course of the assignment; and,
- c) Develop comprehensive human resources analysis of teachers and education professionals in Montenegro.

These objectives should be built on already established strategic frameworks, governance structures, and analytical work completed and are time-bound within the duration of the assignment, expected to result in improved policy implementation, stronger financial and strategic planning, and enhanced institutional performance across the education sector.

3. Description of the Assignment

The scope of the assignment covers the provision of technical assistance to the Ministry of Education, Science, and Innovation and relevant central institutions to develop a fully costed Education Reform Action Plan for 2027–2029 and an accompanying Medium-Term Expenditure Framework, alongside the design and delivery of a structured capacity-building programme in strategic planning, coordination, monitoring and evaluation, and evidence-based policymaking. It also includes development of a comprehensive human resources analysis of teachers and education professionals in Montenegro.

The tasks will include reviewing existing strategic and analytical documents, conducting targeted consultations with key stakeholders, developing planning and budgeting tools, and delivering at least six practice-oriented training sessions over the course of the assignment ensuring that output is directly applied to policy development processes. It should also result in the development a of a comprehensive human resources analysis of teachers and education professionals in Montenegro, along with the relevant recommendations for the policy makers. The assignment is expected to result in the development and validation of key planning documents, support to their submission for Government consideration, and strengthened institutional capacities across the education sector. Therefore, three key objectives of the assignment are:

Objective 1: Develop a Costed Education Reform Action Plan (2027–2029) and Medium-Term Expenditure Framework (MTEF), whereas tasks are envisaged as:

- Conducting a desk review of key strategic, policy and analytical documents (Education Reform Strategy, Action Plan 2025–2026, Functional Analysis, budgeting and financing frameworks) to identify priorities, gaps and evidence for planning.

- Identifying and mapping key stakeholders relevant to Action Plan and MTEF development and conducting consultations with MoESI directorates and central institutions to define planning, coordination and budgeting needs.
- Facilitating sector working sessions to support drafting of the Education Reform Action Plan 2027-2029, including definition of measures, indicators, timelines, responsibilities and budget requirements.
- Providing technical support for costing and budgeting of planned measures and ensuring alignment with national budget processes, timelines and programme-based budgeting principles.
- Developing a methodological framework, tools and templates for preparation of the Medium-Term Expenditure Framework.
- Supporting the development and finalization of the Action Plan 2027-2029 and MTEF for 2028-2030, incorporating inputs from consultations and working groups.
- Supporting the formal review, validation and submission process for Government adoption, including preparation of summaries, briefs and presentations.

Objective 2: Strengthen Institutional Capacities for Strategic Planning, Coordination, Monitoring and Evaluation, whereas tasks are envisaged as:

- Identifying key stakeholders and target participants for the capacity-building programme and assessing institutional capacity development needs.
- Designing a structured capacity-building programme for MoESI and relevant educational institutions covering strategic planning, action plan development, MTEF preparation, coordination, monitoring and evaluation, and evidence-based policymaking and utilization of EU and other external funding instruments in support of education sector reforms.
- Delivering at least six practice-oriented training sessions over the course of the assignment.
- Developing practical training materials, guidance tools and templates to support institutional application of acquired knowledge.
- Ensuring direct application of training outputs to ongoing policy development, planning and budgeting processes.
- Facilitating knowledge sharing, mentoring and follow-up support to strengthen institutional ownership and sustainability of results.

Objective 3: Develop a Comprehensive Human Resources Analysis of Teachers and Education Professionals in Montenegro, whereas tasks are envisaged as:

- Developing the methodology and analytical framework for human resources analysis.
- Conducting a desk review of existing policies, legislation, strategic documents and available evidence related to teachers and education professionals.
- Identifying key stakeholders and conduct consultations to validate analytical scope, findings and recommendations.
- Collecting, compiling and analysing quantitative and qualitative data on the education workforce. Preparing a comprehensive human resources analysis of teachers and education professionals in Montenegro.
- Developing and validating policy recommendations to address identified workforce challenges and support evidence-based decision-making.

The working groups related to each objective will be convened through a series of meetings and/or in multi-day workshops, which will be agreed on between the working group, the Ministry of Education, Science and Innovation, and UNICEF. Inputs will also be collected from workgroup members through formal communication. It is expected that members of each working group related to the above objectives will overlap.

The Consultancy Agency should engage no less than five and no more than seven members, out of whom two should be international experts in education sector reform, education sector planning and administration, at least one international expert in education financing and/or public finance management, one international expert in teacher management respectively, and at least one local expert on education policy. The Consultancy Agency should propose a breakdown of working days in their Technical Proposal with clear justification. Also, the Consultancy Agency should submit a work plan with deliverables (including methodological approach to their implementation), timelines, division of responsibilities, CV of team members and proof of previous assignments.

All deliverables should be prepared in English and Montenegrin language.

Some desk review documents are not available in English, and the national team member with knowledge of local language is expected to provide (essential) translation to the international members when required.

The Consultancy Agency is expected to use their online subscription platform for participation of the team members in meetings, interviews, etc.

4. Deliverables, timelines, and payment schedule

Deliverables	Timeline
Inception report covering all three objectives, building on the detailed work plan, and inclusive of methodology, core themes and stakeholder mapping.	By October 5 th
Objective 1. Develop a Costed Education Reform Action Plan (2027–2029) and Medium-Term Expenditure Framework (MTEF)	
1.1 Conduct desk review report and needs assessment, including gap analysis and presentation of findings	By October 15 th 2026
1.2 Draft Education Reform Action Plan 2027–2029, including measures, indicators, monitoring, and evaluation and implementation framework, following at least two on-site workshops with Working group	By November 30 th 2026
1.3 Draft Medium-Term Expenditure Framework (MTEF) 2028–2030, including costing and alignment with national budgeting processes, with at least one on-site visit	By January 10 th 2027
1.4 Finalize Education Reform Action Plan 2027–2029	By February 10 th 2027
1.5 Finalize MTEF 2028–2030, incorporating feedback from both on-site and online consultations with Working group	By March 15 th 2027
1.6 Support to MoESI to prepare relevant documents/plans for Government approval process (briefs, presentations, finalized documentation)	By March 20 th 2027
Objective 2: Strengthen Institutional Capacities for Strategic Planning, Coordination, Monitoring and Evaluation	

2.1 Design capacity-building programme (six distinct sessions with topics, agendas, material, presentations developed)	By November 1 st 2026
2.2 Deliver capacity-building programme with 4 on-site visits covering 4 distinct sessions, as well as two online sessions with two distinct topics (all sessions delivered, with final training report)	By June 20 th 2027
Objective 3: Develop a Comprehensive Human Resources Analysis of Teachers and Education Professionals in Montenegro	
3.1 Desk review of relevant legislation, policies, strategic documents, previous studies, administrative data sources, and international evidence related to teachers and education professionals in Montenegro, including identification of knowledge gaps. Additionally, it should outline the proposed methodology, data collection approach, and stakeholder engagement strategy.	By 20 th October 2026
3.2 Conduct data collection in line with the approved methodology.	By 10 th November 2026
3.3 Development of the first draft of the Report clearly articulating key findings and draft recommendations	By 30 th November 2026
3.4 Validation with stakeholders through a workshop, presenting key findings and recommendations, through slide deck	By 10 th December 2026
3.5 Development of final Report, including Policy Brief clearly articulating key findings and draft recommendations.	By 23 rd December 2026

Payment	Deliverables	%
1 st Payment	Finalization of Inception report, and deliverables 1.1, 1.2, under Objective 1; deliverables 2.1 under Objective 2, and 3.1 and 3.2 under Objective 3.	35%
2 nd Payment	Finalization of deliverables 1.3, 1.4 under Objective 1; and deliverables 3.3, 3.4, 3.5 under Objective 3.	25%
3 rd Payment	Finalization of deliverables 1.5, 1.6 under Objective 1; and deliverable 2.2 under Objective 2.	40%

Please note regarding specific timelines and schedule of payments: All deliverables shall be considered final only upon review and written acceptance by UNICEF. Payments will be processed only after UNICEF confirms that the respective deliverables have been satisfactorily completed and accepted. Where comments or revisions are requested, the Consultant shall address them before the deliverable is deemed final and eligible for payment.

5. Travel

- Relevant team members of the Consultancy Agency will be required to attend working group meetings, as well as provide capacity building sessions four times within the duration of the consultancy. For the purpose of developing the Human Resources Analysis of Teachers and Education Professionals in Montenegro, the international consultant is expected to travel to Montenegro to support data collection activities and validate the key findings and policy recommendations.
- Breakdown of travel costs should be separately included in the financial offer. Travel is to be confirmed by UNICEF.

- Important: Travel costs will be calculated based on economy class travel, regardless of the length of travel. Costs for accommodation, meals and incidentals shall not exceed applicable daily subsistence allowance (DSA) rates, as promulgated by the International Civil Service Commission (ICSC).
- The national team member may be expected to travel within the country for meetings of the working group and for participation in events organized to collect feedback from actors and stakeholders.

6. Management and Organisation

- Management: The consultancy will be supervised by UNICEF Montenegro ADAP Officer. The ADAP Officer will act as the Contract Manager, coordinating the technical review and acceptance of deliverables with the relevant colleagues, including the UNICEF Education Officer for the education workforce analysis and other designated technical colleagues, as applicable. The Consultancy Agency should communicate with the ADAP Officer regularly and share all deliverables as they become available for review and feedback, as well as Education Officer for general communication on assignment dynamics.
- Organization: International Institutional Consultancy is required, meeting the criteria described below.
- Schedule: This assignment will commence no later than September 25th 2026.

7. Qualification Requirements

The Consultancy Agency should engage no less than five and no more than seven members, out of whom two should be international experts in education sector reform, education sector planning and administration, one international expert in education financing and/or public finance management, one international expert in teacher management respectively, and at least one national expert on education policy with knowledge of local language. The following are the minimum requirements:

Consultancy agency should have a clear focus on education sector planning:

- Research or academic institution with proven experience and involvement in developing strategy and policy documents for the education sector (examples of specific strategic documents and/or policies developed should be provided). Experience in relevant assignments in European countries will be considered an asset.
 - Experience in working on education, education financing, education governance and social sector analysis projects.
 - Proven ability to secure a team of consultants working across specific education sector areas: particularly in relation to strategic management and planning, as well as governance and financing (information on past projects involving multidisciplinary teams to be provided).
 - Demonstrated experience of work with Governmental institutions in the education sector is required;
 - Previous work with UNICEF or other UN agencies is an asset.
1. International team members (up to two people) experienced in education sector reform, education sector planning and administration, and strategic management in education:
 - Advanced university degree in Education, Social Sciences or another related technical field; Master's degree required, PhD is considered an advantage.
 - Minimum 15 years of professional work experience in education in at least 3 countries, with a focus on strategic planning, integrated and multi-sectoral approaches, programming, budgeting, monitoring and evaluation;
 - In-depth knowledge of international and EU policies, recommendations, and benchmarks in education, and best European/EU practices;

- Knowledge of the education system in Montenegro and the region is an asset;
 - Excellent interpersonal and communication skills, experience in working with governments;
 - Excellent analytical skills;
 - Excellent facilitation, presentation, and writing skills;
 - Ability to work under tight deadlines;
 - Excellent command of spoken and written English.
2. International team members (up to two people) experienced in public finance, financing and governance in education:
- Advanced university degree in Economics, Finance, Education, Public Policy, Social Sciences, or another related field;
 - At least ten years of experience in Education Finance and supporting governments and institutions in similar undertakings related to sector financing, budget planning, public finance management.
 - Strong analytical, writing, and presentation skills.
 - Experience in working in the European/EU context will be considered an asset;
 - Experience in working with UNICEF or other UN Agencies will be an asset;
 - Knowledge of the education system in Montenegro is an asset;
 - Excellent interpersonal and communication skills;
 - Excellent facilitation skills;
 - Excellent command of spoken and written English.
3. International team member (up to one person) experienced in teacher management:
- Advanced university degree in Education, Human Resource Management, Education Policy, Public Administration, Economics, Social Sciences, or another relevant field;
 - At least ten years of professional experience in teacher management, education workforce planning, human resources analysis, or education sector reform;
 - Demonstrated experience in conducting teacher workforce assessments, human resource analyses, staffing reviews, or education sector studies at national or sub-national level;
 - Proven experience in analyzing teacher supply and demand, workforce distribution, teacher recruitment, retention, deployment, and professional development systems;
 - Experience in developing workforce projections, forecasting models, and evidence-based recommendations to support education sector planning and policy development;
 - Strong knowledge of good international practices and policy approaches related to teacher management, teacher career development, and education workforce planning;
 - Experience working with Ministries of Education, government institutions, and education stakeholders on teacher management and human resource reforms;
 - Strong analytical, research, report-writing, and presentation skills;
 - Knowledge of the education system and teacher management framework in Montenegro or the Western Balkans region will be considered an asset;
 - Excellent interpersonal, communication, and facilitation skills;
 - Excellent command of spoken and written English.
4. National team member (one person) experienced in education policy:
- Advanced university degree (Master's) in Education, Social Sciences or other related technical fields; PhD is considered an advantage.
 - Excellent knowledge of the Montenegrin education system, from the aspects of its quality, equity, inclusiveness, and teacher management.

- Excellent knowledge of education related to strategic frameworks, legislation, and regulations;
- Minimum 15 years of professional work experience in education;
- Proven experience in working with the Government of Montenegro or in the region in areas related to strategic planning, and development/monitoring of policies and action plans;
- Knowledge of result-based monitoring;
- Experience in working with UNICEF or other UN agencies in related areas is considered an asset;
- Excellent interpersonal skills, experience in working with governments;
- Excellent communication, presentation, and facilitation skills;
- Excellent knowledge of both English and Montenegrin.

8. Application procedure

i. *Technical Proposal including:*

- Portfolio of the organisation/institution/agency with examples of previous work on similar projects and clients in the last 5 years.
- Title/designation of each team member including their CVs;
- Detailed description of the methodology and technical approach, for each of the envisaged deliverables
- Tentative work plan with the number of days and timeframe in line with the above deadlines for deliverables;
- LRPS Form signed.

ii. *Financial Proposal (Budget) including:*

- daily fee rate for each team member per deliverable as well as the total cost per professionals based on the number of working days included in the Technical Proposal.
- Estimated travel costs both international and in country travel. Daily subsistence allowance (DSA) will, where applicable, be paid up to a maximum of the official UN rate. (Reimbursement of travel costs / accommodation expenses will be based on actual expenses).
- Other costs if applicable (e.g translation)

The financial proposal shall indicate the budget estimated in EUR.

9. Evaluation

1) Technical components (total of 70 points)

ITEM	TECHNICAL EVALUATION CRITERIA	MAX OBTAINABLE POINTS
1	Overall Response Overall Response e.g. the understanding of the assignment by the proposer and the alignment of the proposal submitted with the ToR	
1.1	• Completeness of response	10
1.2	• Overall concord between TOR/needs and proposal	15
2	Company and Key Personnel	
2.1	• Range and depth of organizational experience with similar projects • Samples of previous work	10

2.2	• Number of clients, size of projects, number of staff per project	2
2.3	• Client references	2
2.4	• Key personnel: relevant experience and qualifications of the proposed team for the assignment	5
2.5	• Company policy on Child labor, Safeguarding and Prevention of Sexual Exploitation and Abuse (articulate policies for the protection & safeguarding of children and prevention of PSEA)	3
2.6	• Gender component: At least 1 female in the management structure or ownership of the company Workplace policies on disabilities	2
2.7		2
3	Proposed Methodology and Approach e.g. Work plan showing detail sampling methods, project implementation plan in line with the project	
3.1	• Methodology and workplan	10
3.2	• Project management, monitoring and quality assurance process	9
TOTAL TECHNICAL SCORE		70

Minimum technical score: 70% of 70 points = 49 points

2) Financial component (total of 30)²

- Technical proposal evaluation. Proposals passing the minimum technical pass score (49 points-70% of the maximum points obtainable for technical proposal) will continue into the financial proposal evaluation.
- Financial proposal evaluation. The lowest price proposal will be awarded the full score assigned to the commercial proposal.
- Recommendation. The recommendation for award of contract will be based on best combination of technical and financial score.
- Final award and contracts. Based on verified nominations and final scores, contract negotiations could be initiated with one or more successful Proposers.
- The UNICEF evaluation team will select the Proposal which is of high quality, clear and meets the stated requirements and offers the best combination of technical and financial score.

² Financial offer will be reviewed only if technical proposal meets minimum required quality standards.