

Oxfam Pan-European Aid and Development Finance Study

1. Background, rationale and purpose of the study

While Official Development Assistance (ODA) remains a vital source of funding to meet the Agenda 2030 and sustainable development in the poorest countries, most European Member States are failing to meet their commitment (made nearly five decades ago) to allocate 0.7% of their GNI towards ODA. And even more troubling, European donor countries are increasingly diverting aid towards their own domestic policy needs and interests, such as financing in-donor refugee costs, the domestic private sector or a migration-security agenda, rather than for the promotion of social and economic development of poor countries. This undermines the integrity of public development finance (ODA) and development effectiveness. There is an increased polarisation of views among key stakeholders and decision-makers in European donor governments towards development aid, on the one side strong international solidarity but on the other, a growing fatigue and scepticism towards development aid.

Oxfam works closely with allies to influence the aid debate and aid policies & practices in Europe to ensure that Member states meet their commitments, both in terms of the quantity of ODA as well as the quality of ODA - ensuring development effectiveness principles are followed and the purpose of aid remains on addressing poverty and inequality in developing countries. Oxfam's advocacy work in this area has focused on a well-established combination of high-quality, evidence-based advocacy, direct advocacy with key decision-makers, media work, and public engagement around identified decision-making moments. This work is carried out at the national level in several Member States, at the EU level in Brussels and at the global level through engagement with core institutions (e.g. OECD, FFD, GPEDC). While some progress has been made, the challenges described above (in addition to others) have inhibited progress.

The Oxfam Aid and Development Finance team is in the process of updating their strategy for the next 3 years, which includes an updated Pan-European advocacy strategy to influence aid policies and practices in key European markets at the national, EU and global level. The findings and learning from this study will be used to inform the further development of this strategy, in particular, helping the team to refine their joint Pan-European theory of change, identify ways to improve the effectiveness of advocacy strategies and tactics to be implemented jointly and/or linked at multiple levels – national, EU, global.

2. Specific object and objectives of the study

The primary objectives of this study are two-fold – the first focuses on the overall joint Pan-European strategy and the second focuses in more depth on 4 target markets within this overall strategy:

- (1) Provide recommendations for the updated Pan-European aid advocacy theory of change and strategy, particularly in the following areas:
 - a. Identify when, where and how the various teams working at national, regional and global levels should act together over the next 3 years in order to most effectively achieve the policy objectives. This includes helping the team to fine-tune the specific areas/moments where Oxfam can have more influence through working together and how advocacy at these different levels can be better linked and leveraged to influence ODA policies, support a strong like-minded coalition of progressive European countries, create stronger peer pressure and invigorate a narrative of 'racing to the top' in terms of ODA.
 - b. Provide analysis and detailed recommendations on the types of approaches and tactics that would be most effective in the current context and, more importantly, detailed recommendations on how Oxfam can improve the implementation of these tactics.
 - c. Provide additional analysis for certain aspects of our aid influencing work to allow the team to further develop and strengthen their joint strategy (e.g. new actors in the aid and development finance landscape, aid attitudes/narratives in the current European context).

- (2) Provide more in-depth analysis and recommendations for four target markets - France, Germany, the Netherlands and the EU/Brussels – to ensure both that we have detailed analysis and recommendations for these markets and to inform the overall strategy through deeper understanding of the learning and opportunities in a subset of the participating teams.

The objective here is to understand how Oxfam can improve our strategies and tactics in these markets in the next phase to be more effective in achieving the primary aid objectives at the national level, as well as contributing to and leveraging the work being done at other levels of the strategy – in other European markets, at the EU level and the global level.

3. Scope and Approach

The study will involve 2 levels of inquiry: (1) Analysis and recommendations to inform Oxfam’s joint Pan-European aid strategy, which involves work in several European countries (Germany, France, Netherlands, Italy, Denmark Finland, Sweden, Norway, Belgium, Spain, UK), at the EU level in Brussels and at the global level through advocacy with the OECD and other global institutions. And (2) More in-depth analysis and recommendations for the work that will be done in the four target markets: Germany, France, the Netherlands and the EU/Brussels.

The consultant(s) will be asked to propose methodological approaches that are appropriate for achieving the objectives and answering the questions below. We expect that a combination of power analysis/mapping and evaluation methods will be required. The Oxfam commissioning manager and advisory team will work with the consultant(s) to refine and agree to a final approach.

4. Key questions of the study

The focus will be on answering the following questions. Please note these will be refined in collaboration with the selected consultant(s) in the inception phase.

- Based on Oxfam’s aid work in the past 3 years and the current context, where can Oxfam provide the most added value and have the most potential for influence and making progress on the primary aid objectives in the target markets, at the EU level and the global level?
- What strategies and tactics are most likely to influence key stakeholders and contribute to progress toward achieving the interim and primary objectives at the national, EU and global level?
- How can Oxfam improve our tactical effectiveness of core strategies and tactics (e.g. research, engagement in networks, media, direct advocacy with policymakers, public mobilisation) in target markets and through working jointly across teams at national, EU and global levels?
 - Based on Oxfam’s work in the past 3 years, which strategies and tactics have been most effective and how? Which have been less effective and why?

Other detailed sub-questions to be developed with the team and consultant(s) – possible examples below:

- How can we refresh our public narrative(s) on ODA targeting key government stakeholders and publics in target markets, at the EU, and at the global level to more effectively communicate about and generate support for aid issues?
- How can we more effectively attract more and better quality media attention to core aid issues, and minimize the influence of counter-narrative in the media?
- How can Oxfam improve our engagement in networks in a way that will increase our (and allies’) effectiveness in achieving our policy and campaign objectives?
- How can we improve our research to better inform policy debates and/or decisions by policymakers (e.g. in terms of subject matter, dissemination)?
- Are there ways that our advocacy with policymakers can be improved (e.g. choosing targets, approach, timing)?
- How can we more effectively link the reality and experiences from developing countries to the aid debate?

- How can Oxfam better link and leverage advocacy and campaign work at the national, EU and global levels to have greater influence?
 - When and where are the opportunities for Oxfam to have influence in the target markets and at the EU and global levels through our joint work across the various teams who are part of the pan-European strategy?
 - What are the existing commonalities, as well as opportunities for alignment, in terms of the primary policy asks, approaches and tactics of the various Oxfam teams who are part of the Pan-European strategy? What would we need to do differently to more effectively deliver this work as a joint strategy?

5. Consultant team:

The consultant or consultant team should have the following skills and competencies:

- Experience conducting analysis and evaluation of complex political change processes, particularly in the European context
- Experience and strong skills in theories of change, power analysis and evaluation methods relevant to advocacy and social change processes
- Excellent analytical, writing, and synthesis skills
- Team members with fluency in English, French, German, and Dutch, strongly preferred
- Experience in and understanding of the aid and development finance agenda and policies in the European context, strongly preferred
- Experience in and understanding of policy processes and policymaker targets in the target markets (Germany, France, The Netherlands, EU), preferred

6. Schedule, budget, logistics and deliverables.

Schedule:

Deadline	Description
13 March	Expressions of interest due
Week of 19 March	Interviews with eligible consultants. Consultant selected.
6 April	Consultant and Oxfam reach agreement on the inception plan, which includes the refined, detailed methodology.
4 May	Consultant completes data collection and analysis. Consultant presents preliminary findings for discussion with Oxfam staff.
18 May	Consultant conducts additional analysis and/or data collection, if needed. Presents draft report to Oxfam staff.
1 June	Consultant presents final report, executive summary, presentation materials (e.g. powerpoint, handout) data, and final invoice.

Deliverables:

- Finalized methodological approach, including refined schedule & deliverables (6 April 2018)
- Preliminary findings & verbal presentation (4 May 2018)
- Draft final report & verbal presentation (18 May 2018)
- Final report, executive summary, presentation materials (e.g. powerpoint, handout), raw data, and final invoice (1 June 2018).

- 3-5 presentations/webinars to present and discuss the final results and recommendations with Oxfam staff, core partners (details and timing to be determined with the consultant team and Oxfam staff)

Budget:

The preliminary proposal/expression of interest should fall within the allocated budget of \$33,000 USD, including leeway for unforeseen events.

7. Selection Process and expectations for the expression of interest

Oxfam invites bids from individuals and groups of individuals with the experience and skills described above. Please send the following to Lisa Hilt at lisa.hilt@oxfam.org by 13 March 2018:

- a brief 2 to 3-page expression of interest with a description of the proposed methodological approach, description of deliverables, a proposed budget, and a brief summary of qualifications
- A CV detailing relevant skills and experience of no more than 4 pages, including contactable referees (if a group, a CV should be submitted for each member of the evaluation team)

Phone interviews with eligible candidates will be held the week of 19 March 2018. We are aiming to hold the interviews the first half of the week, and we intend to make the final selection by the end of that same week.