TERMS OF REFERENCE

Conduct a Mapping and Baseline Study on CSOs Engagement in Multilateral and Multi-Stakeholder Internet Governance (IG) processes.

Submission deadline: 29th April, 2024

Submission deadline: 29th April, 2024
Estimated start date: May 2024
Location: Remote

1.0 Background

Civil society organisations (CSOs) have been an integral part of the Internet evolution since its inception. CSOs contribute to the development and advancement of technology that underpins the Internet but also develop open-source software, tools, and frameworks enhancing functionality, security, and accessibility. For example, CSOs are instrumental in advocating for an open, free, and secure internet, supporting principles such as net neutrality, freedom of association, privacy protection, and freedom of expression.

The Internet Governance (IG) multi-stakeholder forums provide a good platform for CSOs to effectively monitor and continue to advocate for human rights, accessibility, inclusion, and gender equality. These forums enable CSOs to represent the interests and perspectives of a wide range of stakeholders, including historically marginalised groups. They advocate for the protection of fundamental rights and principles that may be overlooked or undervalued; ensure transparency and accountability in decision-making; contribute to discourse with specialised knowledge and expertise in areas such as digital rights, privacy, cybersecurity, and access to information, allowing for informed and evidence-based policy discussions; advocating for policies and initiatives that bridge the digital divide, focusing on issues of affordability, infrastructure development, digital literacy, and ensuring that communities that have been historically marginalised have equal opportunities to access and benefit from technological development.

Although the role of CSOs in Internet Governance is crucial, research shows that their representation, especially from the Global South, has been largely absent in Internet Governance forums at national, regional, and global levels. This lack of representation is a missed opportunity for advocating more effectively.

Furthermore, CSOs have faced challenges in participating meaningfully in the work of standard-setting/regulatory bodies such as International Telecommunications Union (ITU), the International Corporation for Assigned Names and Numbers (ICANN), and the Internet Engineering Task Force (IETF). The input from CSOs is increasingly essential to ensure that the standardisation processes are fair, transparent, and accountable, addressing the diverse needs and perspectives of all stakeholders, including those from Global South; addressing broader societal issues and ensuring that the resulting standards align with public values and goals; developing well-informed and effective standards; benefiting from enhanced legitimacy and public trust in the standardisation process; and ensuring, ultimately, that the resulting standards have broader acceptance.

It is against this backdrop that the Civil Society Alliances for Digital Empowerment (CADE), a four-year project which started in January 2024, aims to identify barriers to CSOs' structural engagement in Internet Governance related processes, increase partnerships, and develop

tailor-made capacity strengthening programs to enhance the capacity of CSOs to effectively participate IG processes, including Internet standard-setting forums.

The Civil Society Alliances for Digital Empowerment (CADE) project led by Diplo Foundation, is being managed by a consortium comprising Forus, European Center for Non-for-profit Law (ECNL), Collaboration for International ICT Policy for East and Southern Africa (CIPESA), Kenya ICT Action Network (KICTANet), Sarvodaya Fusion, Social Media Exchange (SMEX), Pacific Islands Chapter of the Internet Society (PICISOC) and Fundación Karisma.

The project has three main objectives:

- Increase the capacity of CSOs for meaningful advocacy.
- Enhance the engagement of CSOs in global, regional, and national IG Forums
- Strengthen cooperation between CSOs in the Global North and South.

2.0 Background and rationale for this project

Research start date: April 2024

Location: Flexible (Remote work)

[Forus](#) is an innovative global network empowering civil society for effective social change. It brings together 69 National NGO Platforms and 7 Regional Coalitions from Africa, America, Asia, Europe, and Pacific.

Forus is seeking an external research consultant to develop a methodology and map existing, emerging, and cross-cutting issues affecting CSO engagement, conduct a comprehensive baseline survey to understand these dynamics, and develop actionable recommendations for improving CSO participation in IG fora.

3.0 Objectives of the service

The objectives of this consultancy are:

1. **Mapping existing, emerging and cross-cutting IG Issues and gaps in CSO engagement across key IG Forums:** Identify and document existing, emerging, and cross-cutting issues and gaps in CSO engagement across key IG forums.
2. **Baseline Survey:** Conduct a comprehensive survey to gather data on the engagement of CSOs in IG processes, focusing on challenges, opportunities, and capacity-building/strengthening needs.
3. **Actionable Recommendations:** Develop recommendations and best practices to enhance CSO engagement in IG, based on the findings from the mapping and survey activities. This should include recommendations of potential interventions to be implemented under the CADE project addressing the challenges, opportunities, and capacity needs across the crucial issues identified in the mapping and survey activities.
4. **Prioritisation of Issues:** Develop a list of priorities and potential impactful avenues for the project based on topics, needs and opportunities in the next 2-3 years. This should include possibilities for cross-fertilization, information sharing and learning for CSOs engaged in IG processes.

The study will help the CADE project consortium on five fronts namely,

a. **Relevance and Buy-in:** project partners will be able to design activities that are relevant and applicable to the needs of the targeted CSOs and other stakeholders, in terms of focus for strengthened capacity strengthening training, CSO participation in IG processes and advocacy around key issues, but also in terms of communications focus for coverage and CSO support.
b. **Realistic Resource Allocation:** The exercise will improve resource allocation efficiency since CADE partners will be able to identify high-impact areas to invest in.
c. **Realistic Goal setting:** the baseline data will help Forus and CADE Consortium partners to set achievable and measurable goals.
d. **Inclusivity:** the mapping and baseline study will, among other things, assess the levels of skills and resources available to CSOs. In turn, the CADE project will ensure that there is the closeness of fit between the support that will be provided and CSOs' needs, including CSOs from resource-strapped locations.
e. **Monitoring and Evaluation:** the mapping and baseline study will serve as a reference point for monitoring and evaluating the project's progress. With this data, the impact of the project could be measured easily.

4.0 Scope

The consultant will be responsible for the following activities:

(1) Mapping Study:
- Identify key IG forums and actors, with a focus on CSO engagement from the GS.
- Map existing, cross-cutting, and emerging issues related to the engagement of CSOs in IG forums, notably ITU, ICANN, the IETF, and the IGF.
- Identify gaps in CSO engagement that need to be addressed by capacity development, outreach, and awareness-raising efforts.

(2) Comprehensive baseline study:
- Design and conduct surveys with local and national CSOs, regional coalitions, and grassroots groups, including those representing sexual minorities and people with disabilities, to identify opportunities and challenges for effective participation in IG forums, including gender inclusivity digital gaps, intergenerational practices, digital activism, and more. It will also explore gaps in civil society's capacity to access and influence policy and practices of emerging technologies, notably AI and other emerging topical issues.
- Analyze survey data to identify patterns, trends, and common themes in CSO engagement in IG.
- Focus on localisation, decolonisation principles, digital inclusion deficits, and effective participation challenges in IG forums.
- Include other consortium partners' Case studies.

(3) Recommendations and Best Practices:
- Develop actionable recommendations for improving CSO engagement in IG, based on the mapping and survey findings.
- Highlight best practices for localisation, addressing digital inclusion, and enhancing participation in IG forums.
- Highlight possibilities of media engagement and awareness raising

The work will be carried out by a specialised consultant or team of consultants reflecting the intercultural nature of the CADE project. The Forus Secretariat team will support the steering of the work to be conducted, in close collaboration with CADE Consortium partners.

The successful consultant is expected to work remotely, and no travel is envisaged under this contract.

Principles underpinning this work are:
- Participatory and culturally sensitive process valuing knowledge and approaches from within the context.
- Cross-cutting consideration for inclusion, ensuring that factors related to gender, culture and language are taken into consideration.
- Credibility of the consultant or team of consultants, through use of appropriately skilled expert.
- Usefulness of the mapping and baseline survey findings and recommendations, through timely presentation of relevant, productively critical, clear and concise information, and commitment to building capacity and strengthening the overall CADE project's planning and effectiveness.

4.1 Deliverables

The following are the expected deliverables for this assignment:

a. Inception Reporting, including a detailed methodology, list of materials / tools to be used for the mapping and the baseline survey.
b. Draft Tools for the (1) Mapping Study and (2) Comprehensive Baseline Study
c. Draft Mapping Study Report and Comprehensive Baseline Study Report, along with the suggested recommendations and best practices.
d. Final research report in English that should include the following:
    i. **Executive Summary** of key findings and recommendations.
    ii. The key findings of the mapping study complete with associated evidence and data clearly illustrating the findings. The findings will focus on:
        ▪ Identifying key IG forums and actors, with a focus on CSO engagement from the GS.
        ▪ Mapping existing, cross-cutting, and emerging issues related to the engagement of CSOs in IG forums, notably ITU, ICANN, the IETF, and the IGF.
        ▪ Identifying gaps in CSO engagement that need to be addressed by capacity development, outreach, and awareness-raising efforts.
        ▪ Identify priorities based on topics / opportunities important for engagement in diverse IG forums in the next 2-3 years.
        ▪ Identify potential cross-cutting topics / priorities across in the IG/digital space.
        ▪
    iii. The key findings of the comprehensive baseline survey complete with associated evidence and data clearly illustrating the findings. The findings will focus on:
        ▪ Designing and conducting surveys with local and national CSOs, regional coalitions, and grassroots groups, including those representing sexual minorities and people with disabilities, to identify opportunities and challenges for effective participation in IG forums, including gender inclusivity, digital gaps, intergenerational practices, digital activism, and more. It will also explore gaps in civil society's capacity to access and influence policy and practices of emerging technologies, notably AI and other emerging topical issues.

- Analysing survey data to identify patterns, trends, and common themes in CSO engagement in IG.
- Focusing on localisation, decolonisation principles, digital inclusion deficits, and effective participation challenges in IG forums.

iv. **Recommendations and Best Practices:** Developing actionable recommendations for improving CSO engagement in IG, based on the mapping and survey findings; Highlighting best practices for localisation, addressing digital inclusion, and enhancing participation in IG forums.

v. **Appendices**, including methodology and evaluation tools, list of materials/resources consulted and brief biography of consultant. The list of CSOs can also be included as an appendix to the report.

vi. **Two in-person and/or virtual meetings** with the Steering Committee of the study and the CADE Consortium partners. Dates to be discussed / planned.

4.2 Assignment Duration

This consultancy assignment has a level of effort of 30 days. The successful candidate is expected to commence work by mid-April. The work can be conducted over a three-to-four-month period. The consultant can also develop the study in a shorter timeframe, if possible, which should be explained in the application.

ACTIVITY	TIMELINE
Opening of Call for Proposals	**15th April 2024**
Enquiries	**15th April – 22nd April 2024**
Deadline for Receiving Proposals	**29th April 2024**
Proposal Evaluation and Feedback	**29th April – 3rdth May 2024**
Contract Signing	**6th May 2024**
Expected start date for the study	**May 2024**

6.0 Qualifications and Experience of the Consultants

The preferred consultant must have:

I. Relevant tertiary academic degrees (Masters or PhD Level) in such fields as Law, Information and Communication Technologies (ICT), Social Sciences, Development Studies.

II. Hold at least a minimum of 7 years of professional experience conducting analytical work in the field of ICT/digital development, Internet Governance, policymaking, development management, multi-stakeholder engagement, CSO/NGO capacity building etc.

III. Experience working with standard setting bodies such as ITU, ICANN etc.

IV. Knowledge of Internet Governance processes at national, regional, and global levels.

V.   Relevant experience conducting studies and synthesizing complex information and inputs/recommendations, preferably on the work of CSO engagement in Internet Governance, policy and practices of emerging technologies, digital rights, or related areas.
VI.   Strong understanding of the challenges and opportunities for CSO engagement in IG processes. Expert knowledge of debates around access and connectivity, cybersecurity, digital inclusion, gender policy and digital policy development is a prerequisite.
VII.   Familiarity with the Global South's socio-political context and the specific challenges faced by CSOs in these regions.

7.0 Application procedure

Interested consultants/consultancy firms must express their interest by submitting their proposal (not exceeding 15 pages excluding annexes) containing the following:

a.   A technical offer including:
   i.   Methodology for the mapping study and comprehensive baseline study including, but not limited to, materials/resources to be reviewed, mapping and baseline survey design, survey questions / proposed tools, sampling methodology, work plan.
   ii.   Consultant's understanding of the issues at stake and the Terms of Reference
   iii.   Relevant experience: Provide details of projects of similar scope, complexity and nature you have previously worked on.
   iv.   Specific expertise on IG processes, CSO engagement, policy and practices of emerging technologies, digital rights, or related areas.
   v.   Key personnel and staffing: Describe key personnel who part of the proposed plan and include their CVs (max. 2 pages each and attached as annex).
   vi.   Timeline: Include timeline of key activities
   vii.   Three references (including telephone numbers) and web links to previous work, if available
b.   A detailed financial offer including:
   i.   A line-item budget: The cost estimates used to prepare the budget should be presented in Euros (including VAT and any other taxes). The tenderer should include their proposed daily rate, including all costs.
   ii.   A budget narrative.

All proposals must be submitted via email at recruitment@forus-international.org with copy to kenneth@forus-international.org by 12:00 midnight CET on 29/04/2024. Proposals received after the stipulated time will not be accepted. Only short-listed candidates will be contacted.

The maximum for this project is EUR 20,000 including all taxes and costs.

All enquiries must be sent to kenneth@forus-international.org. The deadline for receiving the enquiries is 22nd April 2024.

8.0 Conflict of Interest

Applicants should clearly highlight any current or previous working or personal links to Forus or other CADE Consortium partners, as well as any risks around conflicts of interest.

9.0 Proposal Evaluation

The proposals will be evaluated in accordance with the European Union procurement regulations regarding handling of such procurement processes. The Quality-and Cost- Based Method will be used to score the applications.

8.0 Payment Schedule

A deliverable based payment system will be used under this contract.

NO.	DELIVERABLE	PERCENTAGE
1.	**Inception Report**	25% of the contract value
2.	**Draft Mapping and Baseline Study Report**	35% of the contract value
3.	**Acceptance of Final Report and Baseline Study Tools**	40% of the contract value
	Total	100% Total contract value