

Development of System for Management of Cohesion Policy

Terms of Reference for Assignment of Senior Non-Key Expert on ESIF Programming

Result 2: Relevant planning and programming documents for EU Cohesion Policy prepared

1. Background

This assignment is to be carried out within the framework of project titled “Development of System for Management of Cohesion Policy” financed by European Union under IPA, having as Project Partner and Main Beneficiary the Ministry of European Integration.

The Project started on 11 July 2019 and will last 36 months.

The **Contracting Authority** for above-mentioned project is the **EU Delegation to Serbia**.

Service Contractor is **GIZ Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH**.

The overall objective is to prepare the Serbian public administration for effective implementation of the EU Cohesion Policy in the Republic of Serbia. The purpose of the contract is to set up and enhance the capacities of all relevant stakeholders for timely and efficient preparation, implementation, monitoring and evaluation of programmes and projects supported by Structural Funds and Cohesion Fund.

The results to be achieved by the Contractor are as follows:

Result 1: Legal and institutional framework for implementation of EU Cohesion Policy in place.

Result 2: Relevant planning and programming documents for EU Cohesion Policy prepared.

Result 3: Capacities of institutions and bodies nominated for implementation of Cohesion Policy, as well as partners and potential beneficiaries at national and sub-national level, increased via Capacity Building programmes.

The assignment of the Senior Non-Key Expert on ESIF Programming shall be framed within the second project component focusing on **preparation of planning and programming documents for EU Cohesion Policy**.

In reference to the second project component, the Terms of Reference for the overall project state that: “Together with the nomination of institutions, the decision on the number of Operational Programmes (OPs) is planned to be made in 2019. As it was stated on the bilateral screening meeting, a limited number of multi-sector/thematic OP(s) in order to ensure more effective coordination and greater synergy between programmes and related investment priorities/operations shall be produced. Also, in order to provide consistent and reliable strategic basis for effective planning and prioritization of the Funds, the Roadmap for revision and adoption of policy/strategic framework is planned to be developed in 2019. It will primarily consider ex-ante conditionalities that relate to existence of adequate policy/strategic framework.

When it comes to preparation of sufficient number of strategically relevant infrastructure projects, important is to mention that current successful practice in the implementation of the Methodology for selection and prioritization of infrastructure projects and resulting Single Project Pipeline will be effectively continued through additional projects supporting preparation of relevant technical and project documentation (e.g. PPF6, PPF 8 currently on-going and PPF 9 programmed under IPA 2016) and will not be part of the current project.

Assistance by the Contractor should be provided for *all preparatory activities* - from definition of methodology, calendar with steps, horizontal and vertical coordination to organization of wide consultative processes. Additionally, above mentioned Roadmap should be properly monitored and if necessary, due to the new legal framework, revised. Finally, expert support is necessary in *preparation of relevant planning and programming documents* including development of documents in defined formats, development of tools that could support prioritisation and increase the potential impact of „soft” interventions”.

2. Approach

Prior to start of the assignment, the selected Non-Key Expert shall study the relevant sections of the following documents:

- Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL laying down common provisions on the European Regional Development Fund, the European Social Fund Plus, the Cohesion Fund, and the European Maritime and Fisheries Fund and financial rules for those and for the Asylum and Migration Fund, the Internal Security Fund and the Border Management and Visa Instrument, COM/2018/375 final - 2018/0196 (COD) including:
 - Annex II: Template for Partnership Agreement - Article 7(4)
 - Annex III: Horizontal enabling conditions – Article 11(1)
 - Annex IV: Thematic enabling conditions applicable to ERDF, ESF+ and the Cohesion Fund – Article 11(1)
 - Annex V: Template for programmes supported from the ERDF (Investment for Jobs and growth goal), ESF+, the Cohesion Fund and the EMFF – Article 16(3)
- Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL on the European Regional Development Fund and on the Cohesion Fund COM/2018/372 final - 2018/0197 (COD)
- Action plan for meeting the EU Cohesion policy requirements adopted by the Government of Serbia in April 2019:
http://www.mei.gov.rs/upload/documents/pristupni_pregovori/akcioni_planovi/action_plan_22.pdf
- EC progress report for Serbia for 2019:
http://www.mei.gov.rs/upload/documents/eu_dokumenta/godisnji_izvestaji_ek_o_napretku/Serbia_2019_Report.pdf
- Benchmarking Allocations for Funds and Thematic Objectives. Assumptions for preparatory work within Chapter 22, by Dr. Peter Wostner, August 2016
- Sectoral situation analyses: Agriculture and Rural Development; Competitiveness; Energy; Environment and Climate Change; Home Affairs; Human Resources and Social Development; Justice; Transport; Public Administration Reform (MEI working documents, 2019)
- Relevant sectoral strategies, as provided by MEI and the Project Team.

According to the ToR for the Project the activities referring to the preparation of the relevant planning and programming documents for EU Cohesion Policy are the following:

„Activity 1.1. Preparation of detailed programming calendar and methodology, covering all necessary activities, milestones, timeline and responsibilities. This will allow synchronisation in preparation of planning and programming documents (i.e. Partnership Agreement and Operational Programmes). Also, it should provide the methodological framework for programming as well as foreseen the usage and work of the existing inter-ministerial coordination mechanism (i.e. Sector Working Groups).

Activity 1.3. Preparation of planning and programming documents for EU Cohesion Policy (i.e. Partnership Agreement and Operational Programmes) in accordance with EU legal framework and relevant templates.“

The Programming Methodology shall inter alia elaborate on the need of ensuring that ‘EU programming’ is framed within national development programming rather than as a separate programming process. The Methodology shall detail the strategic inputs needed as a pre-condition for preparation of the Partnership Agreement and the Operational Programmes. It shall also take into account the need of ensuring complementarity of the timetable for preparation of Partnership Agreement and the Operational Programmes. Furthermore, the Expert shall consider that no legislation on Cohesion policy is adopted or drafted so far in the Republic of Serbia.

Although the number of Operational Programmes is not yet decided at this stage, the assignment shall be carried out assuming that the Operational Programme/Operational Programmes shall focus on intervention eligible under the ERDF, CF and ESF.

The “Action Plan for meeting the EU Cohesion Policy requirements regarding Chapter 22 – Regional Policy and Coordination of Structural Instruments”, adopted by the Serbian government in April 2019, specifies the following measures relevant for meeting the Result 2 of the “Development of system for management of Cohesion Policy” Project:

1.1. Legal framework for introduction of the EU Cohesion Policy within the legal framework of the Republic of Serbia adopted.

4.4 Draft Partnership Agreement prepared.

4.5. Draft Operational Programmes prepared.

The Programming Calendar shall build on the deadlines established in the Chapter 22 Action Plan, activities 4.4 and 4.5, envisaging that draft of the PA will be prepared in 2021, while draft OPs will be prepared in 2022 – with years 2023-2024 dedicated to finalise the preparation of a mature projects pipeline for the OPs implementation starting with 2025. The adoption of the legal framework for introduction of the EU Cohesion Policy in Serbia is foreseen to be finalised in 2020.

The Expert shall work in close cooperation and under the supervision of the Senior Non-Key Expert for Strategic Planning and EU Programming, an expert with experience of programming EU Structural and Investment Funds in EU Member States, in all activities related to implementation of the planning and programming activities and preparation of planning and programming documents.

Both Experts shall work in close cooperation with the Key Expert 2 – Planning and Programming Expert, who in accordance with the ToR is primarily responsible, under Team Leader supervision,

for organization of activities leading towards implementation of activities envisaged under Component 2, related to preparation of planning and programming documents.

3. Description of assignment

The Senior Expert on Strategic Planning and EU Programming and the Senior Expert on ESIF Programming shall form a team in which the Senior Expert on ESIF Programming shall contribute with knowledge of the specific Serbian strategic framework as well as with experience in working in the national environment.

The Expert shall contribute, together with the Senior Non-Key Expert on Strategic Planning and Programming, to the kick-off of Activity 2.1. Preparation of detailed programming calendar and methodology, covering all necessary activities, milestones, timeline and responsibilities.

Depending on the actual date of start of the assignment, the Expert may also provide inputs for the Inception Phase activities related to programming, i.e. Activity 0.6. 'Preparation of methodological proposal for implementation of main project components' by supporting the team in development of the planning and programming calendar as well as the programming methodology. He/she shall participate in developing guidance on activities to be included under the programming calendar and methodology.

On the basis of the a.m. documents and under the guidance of the Senior Expert on Strategic Planning and EU Programming, the Expert shall provide the following outputs:

Document 1: Report on the current state of affairs and plans in the Republic of Serbia related to the thematic enabling conditions (on the basis of desk research and meetings with relevant institutions).

Document 2: Detailed work plan for preparation of the Partnership Agreement.

Document 3: Draft proposal of information for the government related to the process of development of the Partnership Agreement.

Document 4: Technical note on availability of all necessary data (regional and national level) for the development of Partnership Agreement (statistical data, identification of problems, progress with national strategies and actions plans, main partners to be included in the process).

The Expert shall also prepare brief monthly reports which describe the work that was conducted, its results, and put forward recommendations that can be made to the Beneficiary from the expert's perspective. Monthly reports prepared by using the project template, shall be approved by the Senior Non-Key Expert on Strategic Planning and EU Programming and the KE2, and submitted to the Team Leader.

4. Expert profile

SENIOR NON-KEY EXPERT on ESIF PROGRAMMING

Required Qualifications and Skills

University Degree with minimum 3 (i.e. Bachelor's degree) years of studies, preferably in economics, management, other social sciences, geography and/or humanities.

Fluency in both written and spoken English

Fluency in both written and spoken Serbian language

Computer literacy (MS Office including Excel, PowerPoint, Internet)

Very good organisational, coordination and reporting skills.

General Professional Experience

Min. 8 years relevant professional experience.

Specific Professional Experience

Min. 5 years of specific experience related to drafting national level multi-annual strategic / planning documents related to the implementation of EU funds.

Preparation of at least one sectoral analysis at national level.

Min. 1 project including identification and definition of output and outcome indicators under IPA II.

4. Location, duration, (provisional) start/end date

Location: the expert will be working in Belgrade, Serbia, at Project Office and other locations in Belgrade. Missions outside Belgrade are to be pre-authorised.

Starting/ending date: January – September 2020.

Total number of working days: up to 80.

No home work allowed.

Elaborated by: Danuta Jablonska

Date: 17/12/2019, Version: 1, Date: 09/01/2020, Version 2