

Development of System for Management of Cohesion Policy

Terms of Reference for Assignment of Senior Non-Key Expert on Strategic Planning and EU 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.

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

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 Strategic Planning and EU 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 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

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 at least two Operational Programmes are to be prepared, one of which shall focus on intervention primarily eligible under the ERDF and CF, the other one on intervention primarily eligible under the ESF.

The following activities under the Action Plan shall be considered:

1.1. Legal framework for introduction of the EU cohesion policy within the legal framework of the Republic of Serbia.

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 Expert 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 Expert shall contribute to the preparation of the Inception Report by providing inputs for the following two activities:

Activity 0.6. 'Preparation of methodological proposal for implementation of main project components.

Activity 0.8. 'Action planning and preparation of the Inception Report'.

Moreover, he shall contribute to kick-off Activity 2.1. 'Preparation of detailed programming calendar and methodology, covering all necessary activities, milestones, timeline and responsibilities.

Specifically, the Expert shall provide inputs for the following:

- Preparation, by the end of the Inception Phase, of a detailed work plan including: (i) outline and timetable of activities for achievement of Result 2; (ii) main intermediate deliverables and schedule for their achievement; (iii) an input schedule for achievement of both the intermediate and final deliverables; (iv) identification of risks and mitigation measures per the whole activity.
- Preparation of a 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), and should provide the methodological framework for programming as well as foresee the usage and work of the existing inter-ministerial coordination mechanism (i.e. Sector Working Groups)".

At the start of the mission, the Expert shall propose and discuss with the Team Leader and Key Expert 2 the templates for both the work plan and the programming calendar, and the envisaged contents of the programming methodology.

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 submitted to the Team Leader.

Thus, the Expert missions shall have the following outputs:

Document 1: Templates for work plan and programming calendar; envisaged contents of the programming methodology.

Document 2: Technical note on preparation of a detailed work plan for preparation of Partnership Agreement and Operational Programmes.

Document 3: Guidance on activities to be included under the programming calendar and methodology.

Document 2 and Document 3 shall have to be mutually consistent.

4. Expert profile

SENIOR NON-KEY EXPERT on STRATEGIC PLANNING AND EU PROGRAMMING

Required Qualifications and Skills

University Degree (or Master/PhD) in economics, management., other social sciences, geography and/or humanities.

Fluency in both written and spoken English

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

Very good organisational, coordination and reporting skills.

General Professional Experience

Min. 8 years relevant professional experience

Knowledge of EU Cohesion Policy, procedures and rules.

Previous experience in Serbia would be an asset.

Specific Professional Experience

Min. 5 years of specific experience in Strategic planning and EU programming.

Experience with drafting at least one Partnership Agreement in EU Member State.

Experience with transition from pre-accession to European Structural and Investment Funds.

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



Location: the expert will be working in Belgrade, Serbia, at Project Office and other locations in Belgrade,

Starting/ending date: November 2019/February 2020.

Total number of working days: up to 30 (preferably 3 – 5 missions).

No home work allowed.

Elaborated by: Valeria Valeri

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