



TERMS OF REFERENCE

General Information

Implementers	Think for Europe Network (TEN)
Coordinator	European Policy Institute (EPI) – Skopje
Project Title	“WB Reform and Growth Monitor”
Donor	European Commission
Ref. no.	EuropeAid/179703/DH/ACT/Multi
Contract. no.	IPA III/2024/458-693
Position	Expert/s for the development of a monitoring methodology for WBIF-funded projects
Location	Western Balkans (WB) Region
Start Date	02.06.2025
End Date	30.06.2026
Total Contract	5 250 EUR
Contact person	Simonida Kacarska; Director

PROJECT INFORMATION

The Growth Plan, supported by the Reform and Growth Facility (RGF), aims to provide significantly increased funding for the Western Balkans. It introduces conditionality mechanisms tied to binding reform commitments through Reform Agendas (RAs) and strategic infrastructure projects under the Western Balkan Investment Framework (WBIF). This innovative approach within the EU’s enlargement policy framework offers an unprecedented opportunity for economic growth and regional cooperation.

The "WB Reform and Growth Monitor" project aims to enable civil society organizations (CSOs) in the Western Balkans (WB) to actively contribute to the design and credible implementation of reforms aligned with the four pillars of the Growth Plan for the WB (Growth Plan). The project seeks to strengthen participatory democracy and EU approximation in the region promoting good governance, economic development, and regional cooperation.

The action aims at systematically supporting CSO-led monitoring of reforms linked to the EU accession process and EU-funded strategic infrastructure projects. It also establishes multi-stakeholder dialogue platforms led by CSOs to support the implementation of structural reforms at both national and regional levels. A capacity-building re-granting scheme will enhance the engagement and effectiveness of CSOs in designing and implementing sectoral reforms. Last, a



communication and outreach work package will increase public awareness of the implementation, progress, and benefits of the Growth Plan.

The project aims to provide evidence-based analysis and strengthen CSO capacities, offering engagement opportunities in policy and decision-making processes across various thematic areas of the Growth Plan.

Main tasks and responsibilities:

The objective of this assignment is to develop, pilot, refine, and operationalise a monitoring methodology for WBIF-funded projects that allows civil society to track the implementation, effectiveness, and transparency of investments financed through the RGF under the Growth Plan. The methodology should reflect best practices in EU monitoring frameworks (e.g., NextGenEU, IPA, RRF, InvestEU, ERDF/CF), be gender-sensitive, and be adaptable across all six Western Balkan countries.

Specific Tasks:

Task 1: Preparatory Phase and Desk Research (June 2025)

Participate in online preparatory meetings with the project team, including the Project Director (PD) and Lead Researcher (LR), to discuss the approach to work, clarify expectations, provide guidelines, and agree on deadlines. The expert/s is/are expected to prepare for the meetings with a proposal on the initial approach, including a review of existing monitoring frameworks and best practices to inform methodology development and outputs they will deliver. EPI will supply the experts with project documentation, Reform Agendas, and other background materials upon request.

Task 2: Development of Draft Monitoring Methodology for WBIF-Funded Projects (June-August 2025)

Develop the first draft of a monitoring methodology tailored for CSO-led monitoring of WBIF-funded strategic investment projects. The methodology should include monitoring indicators, tools for data collection and verification, templates for reporting, and a gender-sensitive analytical framework, adaptable across all WB6 countries.

Task 3: Refinement of the Draft Methodology through Online Internal Consultations (September 2025)

Conduct a round of online consultations aimed at refining the monitoring methodology of WBIF-funded projects. Engage with the research team from the co-applicant organisations to review the draft methodology and gather feedback. The input received should inform the revision of the



methodology. Additionally, these consultations can lay the groundwork for a clear roadmap for further engagement with other stakeholders.

Task 4: Support the Piloting and Preparation of the WBIF Projects Updates (October 2025 – May 2026)

Support the piloting and application of the monitoring methodology by the research team and ensure that findings from the pilot phase are reflected in the first deliverable—the national "WBIF Projects Updates." Assist the researchers and provide guidance in applying the methodology, conducting structured data collection and verification, and analysing the implementation of selected infrastructure projects financed through the WBIF under the Growth Plan. Assess the usability and performance of the monitoring tools in practice, and if needed, propose targeted refinements to improve the methodology ahead of the next monitoring cycle.

Task 5: Finalisation of Methodology Booklet (May 2026)

The methodology should, if relevant, be refined based on stakeholder input and the pilot phase findings. The final methodology will be published as a methodology booklet with the accompanying developed tools and templates.

Task 6: Contribution and Support to National and Regional WBIF Reports (Oct 2025–June 2026)

Provide contribution and support to the preparation of the national and regional reports assessing the implementation of strategic projects financed under the WBIF financially supported by the RGF. Support quality control by reviewing and providing feedback on draft reports to ensure alignment with the established methodology prior to finalisation, translation, and digital publication.

Qualifications

- Minimum 10 years of relevant experience in designing, implementing, and evaluating monitoring methodologies, particularly in the context of EU programs and reform processes;
- Proven expertise in EU funds, programs and instruments (e.g., NextGenEU, IPA, WBIF, RRF, InvestEU, ERDF/CF, or similar initiatives) and familiarity with EU enlargement policies, economic governance frameworks, and monitoring systems;
- Demonstrated experience in working with CSOs, governments, and multi-stakeholder platforms, including facilitating consultations and workshops;
- Strong analytical, research, and data interpretation skills, with the ability to translate findings into actionable recommendations;
- Proficiency in designing user-friendly tools and templates for data collection, reporting, and analysis;



- Experience in developing reports and communication materials for policymakers, stakeholders, and the general public;
- Ability to work collaboratively with interdisciplinary teams and adapt methodologies to national and regional contexts;
- Excellent written and verbal communication skills in English, with the ability to present complex information in a clear and accessible manner.

Remuneration

The total fee for this position is 5,250 EUR gross. Payments will be made in three installments:

- The first payment of 2000 EUR will be made within 20 days after the completion of tasks 1-3, i.e. submission of the draft methodology and templates.
- The second payment of 1,250 EUR will be made within 20 days of the finalization of the methodology booklet (task 5).
- The remaining 2,000 EUR will be paid upon the successful completion and finalization of task 6 (June 2026).