Terms of References

Title of the evaluation: Country Portfolio Evaluation of German Support to the Republic of Serbia between 2020 and 2026

Date: *01.11.2026*

Requested task: Support to the implementation of the evaluation as an expert on EU accession in the Western Balkans

Timeframe contract: Approximately 12/2026 – 10/2027

About DEval

The German Institute for Development Evaluation (DEval) was founded in 2012 and is based in Bonn. The institute is organised as a German non-profit institution with limited liability (German Limited Liability Companies Act, GmbH). Its sole shareholder is the German Federal Government, represented by the Federal Ministry for Economic Cooperation and Development (BMZ).

The main task of DEval is the independent analysis and assessment (evaluation) of German development cooperation interventions. Additional tasks include the development of appropriate methods and standards, providing qualification measures, as well as supporting evaluation capacity building in the partner countries for German development cooperation. The institute thereby engages in various national and international forms of cooperation.

1 Content about the evaluation

1.1 Background

German Development Cooperation

On behalf of the German government, the BMZ is politically responsible for German development cooperation. It is responsible for the management and control of development policy measures and their effective implementation. German involvement in development cooperation is multifaceted and takes place within multilateral organisations such as the European Union (EU) and the United Nations, through global and regional initiatives and measures, and through bilateral cooperation.

Evaluation is considered a key instrument for gathering evidence on the effectiveness of development policy measures that is as robust as possible, based on objective and empirically sound analyses. Moreover, evaluation makes it possible to generate evidence on the performance of development cooperation actors and to make it available for future processes. Evaluations fulfil an information function, a learning and steering function, as well as a monitoring and accountability function.

Cooperation between Germany and the Republic of Serbia in the area of Development Cooperation

Germany's development cooperation with Serbia focuses on assisting Serbia in preparing for EU integration, especially in the field of climate policy. Thematically, the cooperation aims at reducing emissions and decarbonising the energy sector, as well as ensuring environmentally sound water and wastewater management and a circular economy. In addition, the German development cooperation fosters (green) economic development and employment and the creation of economic and social opportunities.

The bilateral development cooperation focuses on the following core areas:

- **Climate and energy, just transition** (Areas of intervention: renewable energy and energy efficiency; sustainable urban development)
- **Sustainable economic development, training and employment** (Areas of intervention: technical and vocational education and training; private sector and financial sector development)

Germany and Serbia also work together in the field of good governance, which is a key prerequisite for EU accession.

Germany and Serbia have been engaged in development cooperation since 2000.[1] Serbia plays a crucial role in the political stability of Southeast Europe and has been an important bilateral partner country for German development cooperation in this region. In 2021, the two countries established a climate partnership aimed at supporting Serbia in formulating and implementing its climate policy in line with the goals of international climate agreements and the commitments within the EU accession process. Germany is one of the largest donors of ODA to Serbia, with the BMZ representing the most important ministry in terms of ODA commitments.

[1] The partnership was originally established with the Federal Republic of Yugoslavia (2000–2003) and subsequently with the State Union of Serbia and Montenegro (2003–2006). Since 2006, cooperation has continued with the Republic of Serbia as an independent partner country.

1.2 Overall purpose of the evaluation

The purpose of this evaluation is to conduct a country portfolio evaluation (CPE) of German bilateral support to the Republic of Serbia from 2020 to 2026.

The specific objectives of the CPE are defined as follows:

- Accountability function: The evaluation shall contribute to the accountability of German support to the Republic of Serbia both to the parliament and the public in Germany and Serbia.
- Learning function: The evaluation is expected to trigger a continuous reflection and learning process in the BMZ and implementing organisations.
- Steering function: The evaluation aims at providing relevant information for evidence-based and strategic management of the BMZ financed portfolio in Serbia.

The evaluation subject is the German bilateral portfolio comprising all measures financed and managed by the BMZ and implemented by the implementing organizations (mostly KfW and GIZ) (German Cooperation in Serbia, 2025) in Serbia in the period between 2020 and 2026, including special initiatives, regional and global projects.

1.3 Evaluation design and questions

The evaluation will follow a theory-based approach whereas the detailed design and instruments will be elaborated and determined in the inception report. The portfolio is analysed and evaluated according to a selection of the Organisation for Economic Co-operation and Development's (OECD) Development Assistance Committee (DAC) evaluation criteria (OECD, no date). The aim of the CPE is to generate evidence-based statements on the selected evaluation criteria. Further adjustments of the questions will be made during the ongoing inception phase.

Overarching Evaluation Questions[2] (considering guidelines for using the OECD-DAC Criteria in evaluations)

1. **Relevance**: To what extent was/is the BMZ-financed official development cooperation in Serbia between 2020 and 2026 relevant from a development policy perspective?
2. **Coherence:** To what extent was/is the BMZ-financed official development cooperation in Serbia between 2020 and 2026 coherent both within and across ministries and strategically coordinated with international development cooperation actors?
3. **Effectiveness:** To what extent has BMZ-financed official development cooperation in Serbia between 2020 and 2026 achieved its goals?
4. **Impact:** To what extent did the BMZ-financed official development cooperation in Serbia between 2020 and 2026 contributed to overarching development policy results?
5. **Sustainability:** To what extent are the changes achieved by BMZ-financed official development cooperation in Serbia between 2020 and 2026 sustainable?

[2] These are the overarching evaluation questions for country portfolio evaluation. They will be further specified during the inception phase and shared in a timely manner with the consultant.

2 Information on the Contract

2.1 Overall objective of the contract

DEval is looking for an expert for participating in the evaluation as a specialist for EU accession processes in the Western Balkans. The objective of this consultancy is to support the DEval team in evaluating the effectiveness, impact and sustainability of the progress made towards EU accession in Serbia, as well as the relevant contribution of German development cooperation to this progress. The expert will be involved in desk research, preparing data collection, conducting own data collection in virtual interviews, and data analysis as well as supporting the elaboration of conclusions and recommendations.

The expert will support the DEval team and closely cooperate throughout the remaining evaluation. The inception phase of the evaluation is about to end; the main data collection phase will take place between February and March 2027. The timing of the data collection described here is indicative and will be coordinated with the expert as soon as possible.

Specification of the requested tasks

The expert shall perform the following tasks[3]:

Continuously:

- **Participation in meetings of the evaluation team, including participation in a virtual kick-off meeting**: The expert will participate in a brief kick-off meeting to discuss the objective of the contract, the content of the evaluation, and the required tasks and deliverables. Throughout the duration of the contract, the DEval team and the expert will meet regularly to exchange and update each other on ongoing activities, primarily relating to the development of data collection instruments, data collection, and analysis, and final reporting. The expert is expected to prepare adequately for these discussions and provide expertise and experience to all aspects of the evaluation.

Data collection phase:

- **Desk-based analysis and assessment of the effectiveness and impact of Serbia's EU accession progress, focusing on areas supported by German development cooperation[4].** The expert will prepare a draft input paper using secondary data assessing Serbia's progress in the areas supported by Germany. This assessment may also cover Germany's regional support for the Western Balkans, which is relevant to Serbia. The DEval team will provide the expert with the necessary background information on the German portfolio, as well as guiding questions and a predetermined structure for the assessment. The paper should be written in English and should not exceed 5 pages (excluding bibliography). The expert will explain the paper in a virtual presentation.
- **Support to the preparation of the data collection**: In close cooperation with the DEval team, the expert will support the elaboration of semi-structured interview guidelines for relevant interview partner groups. The expert may suggest additions to the list of potential interview partners.
- **Data collection and documentation**: The expert will conduct a limited number of virtual interviews jointly with the DEval team in line with the used data collection instruments. The

[3] The specific tasks may take place in different phases of the evaluation, while the description outlines the intended sequence.

[4] The areas are: climate and energy, just transition (including renewable energy and energy efficiency and sustainable urban development); sustainable economic development, training and employment (including technical and vocational education and training; private sector and financial sector development); good governance.

interviews shall be recorded if interview partners express their consent. In addition, the expert will provide detailed written documentation of the interviews and other data collection activities using the templates provided by DEval (in English). The audio file and minutes of each interview need to be sent to the DEval team within three days after the completion of the interview.

- **Revision and finalisation of the analysis and assessment**: The expert will revise the desk-based assessment by integrating the results of the interviews, then provide a finalised report to the DEval team.
- **Feedback loops:** Data analysis will be conducted under the direction of the DEval team. However, the expert will contribute to the analysis and interpretation of the data by reflecting on the findings and providing contextual insights. They may also be asked to provide feedback on the results, conclusions and recommendations of the evaluation.

2.2 Responsibilities between DEval and the expert

The DEval team is responsible for the supervision of the tasks required to achieve the objectives. It is the responsibility of the expert to deliver products to the DEval team in an appropriate form and quality without exception. The expert will complete the tasks independently and on time. Final deadlines will be specified as soon as possible. The tasks to be performed will be carried out in close collaboration with the DEval team. Depending on the interview partner, the expert conduct interviews either jointly with the DEval team or in close collaboration.

From the expert we expect high degrees of motivation, flexibility, reliability, and confidentiality. The DEval team will communicate deadlines and possible changes in the schedule as early as possible.

Required qualifications

In order to assess the professional qualifications of the expert the following requirements have to be met and are to be proven by the expert's CV (no longer than eight pages, font size 11):

- University degree (Master degree or equivalent) proven by copy of diploma;
- A minimum of 4 years of professional experience within the last 10 years in the field of international cooperation in EU accession candidate countries and potential candidates[5] proven by CV and/or references;
- Professional experience in at least 2 projects / assignments (with a minimum of 20 working days each) related to EU accession in Serbia within the last 15 years proven by CV and/or references;
- At least 3 years of professional experience within the last 10 years in the field of research, monitoring and/or evaluation proven by CV and/or references and/or a list of publications;
- At least 2 years professional and/or research experience covering at least two of the following areas: i) renewable energy and energy efficiency; ii) sustainable urban development; iii) technical and vocational education and training; iv) private sector and financial sector development; v) good governance; proven by CV and/or references and/or list of publications;
- At least 3 projects / assignments (with a minimum of 20 working days each) demonstrating professional experience in qualitative data collection and analysis, such as conducting semi-structured interviews and qualitative content analysis; proven by CV and/or references;
- Excellent knowledge of English (C1, written and oral) proven by CV/certificates and/or references.

[5] A full list is available at https://enlargement.ec.europa.eu/enlargement-policy/candidate-countries-and-potential-candidates_en. Experience obtained in Croatia before its EU membership, during its candidate status period, is also eligible.

3 Working days and schedule

The period of cooperation shall be from December 2026 until latest October 2027. The maximum number of working days for the expert will be **up to 15**. DEval is not obliged to call up the maximum number of working days mentioned here. The workload for the expert is expected to be distributed as follows:

	Deliverables	UP TO DAYS	TENTATIVE DATES (2026/2027)
1.	Participation in a in a virtual kick-off meeting and in regular meetings with DEval team	2	Continuously, but intensified during the data collection phase
2.	Desk-based analysis and assessment / input paper	4	December 2026–January 2027
3.	Support to the preparation of the data collection	1	December 2026–January 2027
4.	Data collection and documentation	3	February–March 2027
5.	Revision and finalisation of the analysis and assessment	1	April–May 2027
6.	Contribution to analysis, reporting and elaboration of conclusions and recommendations	4	August–October 2027
	TOTAL OF WORKING DAYS up to	**15**	

4 Additional Information

The bidder should carefully read the attached evaluation matrix before submitting the application. Particular attention should be paid to evaluation criteria C8, which require the bidder to provide a document (max. 1 page, font size 11) outlining the understanding of this assignment and how the bidder collaborates with DEval's evaluation team to contribute to the overall success of the CPE Serbia. Attention should also be paid to evaluation criteria C9 and C10. The virtual interviews, which are part of the tendering procedure, are planned to take place during calendar week 49 (i.e. from 30 November to 4 December).

List of references

German Cooperation in Serbia (2026), "German Cooperation in Serbia", *https://germancooperation.rs/* (last accessed: 28/10/2026).

OECD (no date), "Evaluation Criteria", *OECD*, *https://www.oecd.org/en/topics/sub-issues/development-co-operation-evaluation-and-effectiveness/evaluation-criteria.html* (last accessed: 28/10/2026).

Further Literature

- **Vorwerk, K. and M. Köder (2024),** "*Strategic Portfolio Management in German Bilateral Development Cooperation (Executive Summary*)", German Institute for Development Evaluation (DEval), Bonn.
- **Vorwerk, K., M. Nikitka, M. Kiefer and B. Back (2024),** *"Country Portfolio Evaluation Peru (Executive Summary)",* German Institute for Development Evaluation (DEval), Bonn.
- **Hartmann, C., M. Amine, S. Klier and K. Vorwerk (2019),** "Country Portfolio Reviews. A Tool for Strategic Portfolio Analysis in German Development Cooperation", German Institute for Development Evaluation (DEval), Bonn.