

## Terms of Reference for

# Expert(s) for the Final External Evaluation

*within the project Enhancements in the Quality of Education and Training in South Eastern Europe - EQET SEE/ PN: 8259-00/2021*

**Contracting authority (Contractor):** Education Reform Initiative of South Eastern Europe (ERI SEE)

**Project:** Enhancements in the Quality of Education and Training in South Eastern Europe - EQET SEE

Project number: 8259-00/2021

**Funded by** Austrian Development Agency (ADA) and Education Reform Initiative of South Eastern Europe (ERI SEE)

**Target economies:** Albania, Bosnia and Herzegovina, Kosovo\*, Moldova, Montenegro, Republic of North Macedonia, Serbia.

**Project budget:** 2027399.00 EUR

**Evaluation budget:** 50000.00 EUR

**Duty station:** not specified, however evaluators must be available for online meetings with contracting authority and for implementing field evaluation in Montenegro and Serbia.

**Approximate number of days for field evaluation in Montenegro and Serbia:** up to 10

**Project implementation period:** 01 October 2021 - 30 September 2024 with the extension until 31 March 2025

**Evaluation duration:** 15 January 2024 - 25 March 2024

**Publishing date:** 13 December 2024

**Submission of applications deadline:** 13 January 2025 by 17:00 CET

**Applications** are to be sent to [office@erisee.org](mailto:office@erisee.org) with subject: Application for EQET SEE External Evaluation

**Eligibility:** Individual evaluators, teams of individual evaluators, and legal entities.

**Contact:** For additional information regarding the Call for Expert(s) for the External Evaluation, (potential) applicants can contact the EQET SEE regional project coordinator Ivana Živadinović ([ivana.zivadinovic@erisee.org](mailto:ivana.zivadinovic@erisee.org)).

Queries can be raised by 31 December 2024 at the latest and will be replied to within 3 working days (1) via an e-mail to the person raising the query and (2) by posting the query and the reply on the ERI SEE Evaluation webpage: [https://www.erisee.org/eval\\_eqetsee\\_final24/](https://www.erisee.org/eval_eqetsee_final24/)



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## I Context and Background

### 1.1. Behind the EQET SEE project

The Education Reform Initiative of South Eastern Europe ([ERI SEE](#)) is a regional platform for cooperation in the field of education and training. As an international organization ERI SEE supports sustainable education reforms through regional cooperation. It aims at fostering shared European standards in education and training for a rapid integration of its member countries into a wider European area of education, thus contributing to the success and sustainability of the EU integration process. ERI SEE takes into account both country-specific needs and demands in education reforms, as well as present trends in the development of the envisaged European area of education. Member countries of ERI SEE are Albania, Bosnia and Herzegovina, Croatia, the Republic of North Macedonia, Moldova, Montenegro and Serbia. Kosovo\* participates in ERI SEE activities as an associated partner.

Among the areas prioritized by the ERI SEE are [Vocational Education and Training](#) (VET) and [quality assurance of the pre-tertiary education](#) (QA). To address these areas, the ERI SEE, in cooperation with the VET and qualification agencies (QA), chambers of commerce (CC) (gathered under the Western Balkans Alliance for Work-based Learning - [WBA for WBL](#)), and Quality Assurance Agencies (QAA) in the Western Balkan (WB) region, has been implementing a project titled Enhancements in the Quality of Education and Training in South Eastern Europe - [EQET SEE](#), funded by the Austrian Development Agency with funding from Austrian Development Cooperation.

The [Enhancements in the quality of education and training in SEE – EQET SEE](#) project addresses two topics: increasing the labour market relevance of VET provision (**VET component of the project**) and enhancing quality assurance in pre-tertiary education, through aspects of external evaluation of institutions (**QA component of the project**).

Within the **VET component** of the project, the EQET SEE consortium has developed regionally based, labour market oriented occupational (OS), qualifications standards (QS) and VET curricula incorporating work-based learning and assuring quality of VET provision through developing supporting measures and material (guidelines for work-based learning, trainings for teachers and company instructors and teaching and learning material). The EQET SEE project was based on the results of the previous, also regional, Towards Regionally-based Occupational Standards ([TO REGOS](#)) project, implemented in the period 2019 - 2021: A [Methodology for the Development of Regionally Based Occupational Standards: defining guiding principles, steps and methods \(ERI SEE, 2021\)](#), [Feasibility Study on Developing Regionally Based Standards of Qualifications \(ERI SEE, 2021\)](#), and [Methodology for the Developing Regionally-based Standards of Qualifications \(ERI SEE, 2021\)](#).

Three years of the EQET SEE project have resulted in the development of two regionally based occupational standards (OS), 12 national OSs based on regional OS, two regionally based qualification standards (QS), 12 national QS based on regional QS and 12 national curricula, 12 trainings on the implementation of the new curricula, 12 publications (teaching and learning material, work-based learning guidelines and guidelines and

manuals on environmental, social and gender aspects), 2 sets of regional training programmes for trainers of teachers and company instructors and over 60 trainers of teachers trained on new curricula at regional level.

Within the **QA component** of the project, the EQET SEE has been supporting the work of external evaluators – key actors in the process of quality assurance of educational providers (kindergartens and schools), through developing regional standard of competences of external evaluators; external evaluators' training needs analysis; training programme for external evaluators and its implementation at regional and national levels; collecting examples of good practices in the implementation of external evaluation methodologies and their testing at school level; policy guidelines and internal quality management guidelines for agencies active in the QA process.

The ERI SEE Study on [The Aspects of External Evaluation in General Education: Focus on external evaluators' initial and continuous trainings and monitoring in South Eastern Europe \(ERI SEE, 2020\)](#) served as the baseline for the QA component of the EQET SEE project.

The QA component's activities directly involve quality assurance agencies in pre-tertiary education, ministries of education, methodology experts, education experts, training experts, external evaluators, a sample of schools, and a sample of teachers and principals.

The results of the project are as follows:

### **VET component**

**Outcome 1:** Improved national curricula that integrate work-based learning elements and are based on regionally agreed occupational standards and qualification standards, relying on labour-market relevant skills and learning outcomes

#### **Outputs:**

- 1.1. Improved cooperation between business and education sector in VET at regional and national level:
2. Developed and adopted labour-market oriented regionally based occupational standards
- 1.3. Developed and adopted regionally based, equitable, inclusive and sustainable qualification standards with labour-market relevant learning outcomes
- 1.4. Developed and adopted national programmes/curricula incorporating work-based learning, equality and sustainability relevant attitudes

**Outcome 2:** Increased competences of teachers, mentors and company instructors for the implementation of national curricula integrating work-based learning elements

#### **Outputs:**

- 2.1. Developed teaching and learning material (agreed regionally and adapted nationally)
- 2.2. Developed regional guidelines for implementation of the WBL components in the curricula (agreed regionally and adapted nationally)
- 2.3. Developed quality assurance recommendations for the implementation of curricula with work-based learning, equality and sustainability elements (and shared with the QA component of the intervention)

2.4. Developed and implemented training modules for trainers of teachers, company instructors and school coordinators

## QA component

**Outcome 3:** More effective, cost efficient and cooperative quality assurance processes supported by increased capacities of quality agencies and external evaluators

### Outputs:

- 3.1. Developed regional competence standard for external evaluators
- 3.2. Developed and implemented regional training modules for external evaluators
- 3.3. Developed regional quality guidelines and procedures for quality agencies (including evaluation, recruitment, initial training, CPDs, equality, sustainability...)

**Outcome 4:** Enhanced quality culture at national level supported by higher level of evidence-based policy making and partnership relationships between the actors in the process of QA

### Outputs:

- 4.1. Improved cooperation activities between schools, QA agencies and other stakeholders
- 4.2. Revised of QA methodologies, accompanying instruments and tools to support development of quality culture
- 4.3. Piloted methodology at a sample of schools

## 1.2 Behind the evaluation

The funding of the evaluation process comes from the EQET SEE (with total budget of 2,027,399.00 EUR). The main principles of the evaluation are defined by the **Evaluation Policy of the Austrian Development Cooperation** (MFA, 2019) and [Guidelines for Project and Programme Evaluations](#) (ADC, 2020). According to the latter, the evaluation is a 15-step process that goes through three main stages: design, implementation and utilisation (ADC, 2020). The ERI SEE is the first and main responsible actor for the quality assurance process. The workflow that visualises roles and responsibilities within the evaluation process is outlined in Annex 1 of the [Guidelines](#) (ADC, 2020 p:38). The quality check lists for the main deliverables, Inception report and Evaluation report are provided in the [Guidelines](#) Annex 5 (ADC, 2020 p:46) and Annex 6 (ADC, 2020 p:48) respectively.

Applicants are strongly advised to consult above listed documents prior to submitting the application.

## II Purpose and Objectives of the External Evaluation of EQET SEE project

The EQET SEE project evaluation<sup>1</sup> is by type the end-term<sup>2</sup> evaluation. It is to be implemented in the period December 2024 - February 2025.

The main purpose of the evaluation is to assess the overall project progress and results against the objectives indicated in the project document, with the learning-oriented focus.

The objectives of the evaluation are:

1. To assess the interventions coherence, effectiveness and sustainability
2. To identify good practice and lessons learned during the intervention
3. To provide recommendations for future activities at regional level, specifically focusing on development of skills and quality assurance mechanisms.

The results of the EQET SEE project evaluation will be used further by the lead and implementing partners for the purpose of learning about success and failure factors, sustainability of results, and drawing conclusions relevant for their future cooperation. The results of the EQET SEE project evaluation should include the list of recommendations for future actions at regional level with regards to specific criteria evaluated. The purpose of these recommendations is to consider them for policy intervention in each participating economy and integrate them in the planning of the second phase of the project intervention.

The users of the evaluation results are identified on two levels: primary and secondary users.

- The **primary users** of the evaluation are the lead and implementing partners of the EQET SEE project that will utilise the evaluation results for their policy interventions, institutional learning and in the context of planning further projects to potentially be submitted for ADA funding.
- The **secondary users** are
  - a. relevant stakeholders in each economy (ministries responsible for education and labour, VET providers, schools) as well as other projects implemented in seven EQET SEE economies in the field of VET and QA, for their policy making, practice and information sharing.
  - b. ADA project manager(s) and ERI SEE Governing Board members who will use the evaluation results within their own scope of authority.

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<sup>1</sup> **Project/programme evaluation** of a single development measure designed to attain specific objectives with a pre-specified budget and a set plan of action (project evaluation) or evaluation of a combination of measures put together to attain specific development objectives at global, regional, national or sectoral levels (programme evaluation)' MFA (2019)

<sup>2</sup> **End-term** evaluations are generally conducted to assess how and why results were achieved (or not), in order to inform decision-making with regards to programme and project continuation.' (ADC, 2020)

### III Scope

The evaluation will cover selected project results that have been achieved since the beginning of the project until the time of the evaluation in the EQET SEE economies.

More precisely the evaluation is to implement:

- Qualitative desk-research (document review) of primary and secondary sources for all economies
- Quantitative surveys with stakeholders in six EQET SEE economies
- Interviews with relevant actors in two EQET SEE economies

The evaluation will be guided by the evaluation criteria: coherence, effectiveness, and sustainability.

### IV Evaluation Questions

Suggested evaluation questions in relation to the evaluation criteria and previously defined objectives are:

#### I Coherence:

1. To what extent is the design of the project logical and coherent with national regulations, policy frameworks and other interventions carried out by the institutions/governments involved?
2. To what extent are the regionally based occupational and qualification standards developed in line with national regulations and policy frameworks in the EQET SEE economies?
3. To what extent are developed trainings for teachers, company instructors and external evaluators aligned with institutional policies for HRD/CPD?

#### II Effectiveness:

4. To what extent has the project successfully integrated regionally-agreed OS and QS (with LM relevant skills and LO) and WBL elements, into curricula?
5. Did the project effectively train teachers and instructors on implementing the new curricula?
6. How effectively has the project fostered partnerships between educational institutions and industry stakeholders (chambers of commerce and business representatives)?
7. Did the project effectively train external evaluators for more effective, cost efficient and cooperative quality assurance process?
8. Did the project effectively contribute to enhanced quality culture at national level, evidence-based policy making and partnership relationship between the actors in the process of QA at national and regional levels?

#### III Sustainability:

9. Are the developed occupational standards, qualifications, and curricula likely to be adopted and used by national VET systems after project completion?
10. Are the developed publications, instruments and tools supporting development of quality culture (Good practices, standard of competences, training needs analysis, training programmes, internal quality manual) likely to continue to be used by national external evaluation agencies after project completion?

## V Design and Approach

The evaluation is to be based on the non-experimental design (ADC, 2020). Methodology will combine quantitative and qualitative methods by conducting:

- **Desk research** of national procedures and policy frameworks related to the occupational, qualification standards, curricula, educational material and training, quality assurance procedures on external evaluation.
- **Desk research** of institutional regulations, procedures and practices governing the HRD/CPD of teachers, company instructors and external evaluators as well as developed trainings for said groups.
- **Conducting face-to-face (F2F)<sup>3</sup> interviews** in two economies: Montenegro and Serbia (National contact points - NCPs) (n=8), representatives of implementing partners/ministries/employment agencies/sector skills councils /schools, other stakeholders that participated in the project (n=10 (5 per economy)), experts for cross-cutting topics that took part in the project<sup>4</sup> (n=2), local experts for occupational, qualification standards, development of educational material, and external evaluation that participated in the project (n=12 (6 per economy)), representatives of the lead partner (n=4 - Project Manager, Regional Project Coordinator, Sector Project Coordinator) not less than 36 participants taking part in structured or semi-structured interviews and/or focus groups. The initial report (inception report) will allow for expansion of the number of interviews.
- **Quantitative survey** with the EQET SEE target groups and relevant stakeholders implemented using on-line tools. The quantitative survey will have two goals:
  - Goal 1: to map topics and questions as the preparation for the interviews which will allow more focused design of the interviews.
  - Goal 2: to reach all participants (people directly involved in the project, including representatives of the education and business sector) and relevant stakeholders (VET and Chamber of Commerce members, skills councils or sector councils, External evaluation agencies, agencies for development of education, inspectorates), from both economies and explore aspects of coherence, effectiveness and sustainability.

The selected evaluators will be asked to develop the **Inception report** as the first step to elaborate on methods and define the final sample sizes for both quantitative and qualitative surveys/interviews. The methodology outlined in this ToR is to be further elaborated by the evaluator(s) in the **inception report**. This list above is to serve as a general guideline for the development of technical and financial proposal by applicants. However, the basic methodological principle of evaluation is that the data collection and analysis methods must be sufficiently rigorous to allow for a complete, fair and unbiased assessment. In addition, the ADC crosscutting topics (social sustainability, gender equality and environmental sustainability) as well as the basic principles and quality

<sup>3</sup> The primary goal is to conduct F2F interviews. The option of online interviews remains as a possibility that should be justified in the inception report and approved by the ERI SEE Secretariat.

<sup>4</sup> Gender equality, social sustainability and environment sustainability



standards applying to ADA’s programme and project<sup>5</sup> design should be incorporated in the evaluation design, approach and methods’ (ADC, 2020).

Evaluation is to be conducted in line with the ADC (ADC, 2020; MFA, 2019) and OECD/DAC norms and standards (OECD, 2019a). The evaluation experts will be asked to follow ethical guidelines for evaluation<sup>6</sup>.

## VI Workplan

The evaluation process will go through three phases: (1) design<sup>7</sup> (2) implementation and (3) utilisation<sup>8</sup> (ADC, 2020). While the first and the last phase are implemented by the ERI SEE Secretariat, the second, implementation phase is to be conducted by selected evaluator(s).

The IMPLEMENTATION phase consists of the following activities:

*Table 1: The list of evaluation activities*

No	Activity <sup>9</sup>	Role of evaluator(s)
1	The participation in the kick-off meeting <sup>10</sup>	Participation
2	The development of an evaluation matrix following the template <sup>11</sup>	Implementation
3	The development of inception report <sup>12</sup>	Implementation
4	Data collection and analysis.	Implementation
5	Development of findings, conclusions and recommendations	Implementation
6	Development of the draft evaluation report <sup>13</sup> incl. the Results Assessment Form - RAF <sup>14</sup>	Implementation
7	Participation in project management meetings with the ERI SEE	Participation
8	Collection of feedback from relevant stakeholders and development of feedback matrix	Participation
9	Submission of the draft report for approval	Implementation

<sup>5</sup> For comprehensive outline of ADA quality documents please consult literature listed in this ToR.

<sup>6</sup> Outlined by the *Ethical Guidelines for Evaluation* (UNEG, 2008).

<sup>7</sup> The **DESIGN phase** includes preparatory activities implemented by the ERI SEE Secretariat from setting the evaluation into relevant theoretical and methodological framework, to developing and publishing ToR to selecting and commissioning the evaluator(s)

<sup>8</sup> The **UTILISATION phase** is implemented by the ERI SEE Secretariat who will work on findings and develop a management response.

<sup>9</sup> For detailed description of each phase please consult **Guidelines for Project and Programme Evaluations** (ADC, 2020)

<sup>10</sup> **Kick-off meeting** - ‘The meeting, which can be held either in person or virtually, provides an opportunity for both parties to clarify the mandate and mutual expectations and to have a substantive discussion on how the evaluation will be carried out’ (ADC, 2020) The meeting will be organised by the ERI SEE Secretariat.

<sup>11</sup> **Evaluation matrix** - ‘The matrix is a planning tool, which helps ensure that the evaluation will be able to address and answer all evaluation questions in a sufficiently robust manner. When developing the matrix, the evaluator(s) need to carefully review and refine the evaluation questions as stated in the ToR. They may also suggest to reformulate, regroup and reprioritise and sometimes even remove questions as long as this is justified and agreed upon with the evaluation manager and the ADA programme and project manager.’ (ADC, 2020) The evaluation matrix template can be found in Guidelines for Project and Programme Evaluations as Annex 7 (ADC, 2020).

<sup>12</sup> **Inception report** - ‘It serves as a roadmap for the evaluation and helps ensure a shared understanding between the evaluator(s), the evaluation manager and the ADA programme and project manager concerning workplan, deliverables and timeframes. Importantly, it further outlines the evaluation design and presents the data collection and analysis methods and tools to be used. The IR has yet another function: To identify potential risks and limitations along with adequate mitigation strategies.’ (ADC, 2020)

<sup>13</sup> **Draft evaluation report** - ‘The draft report should be well-written and carefully presented, following the report structure outlined in Annex 6 (of the Guidelines, author’s note), (ADC, 2020). The evaluation report must utilise predefined templates and contain all accompanying annexes outlined in the Guidelines (ADC, 2020) including but not limiting to recommendations for lead and implementation partners.

<sup>14</sup> **The Results Assessment Form** ‘is a mandatory annex to the evaluation report of ADA PP evaluations. It serves to help ADA to assess how integrated results-based management is implemented at the level of programs/projects and make an assessment of the extent to which programmes and projects contribute to the achievement of results at different levels’ (ADC, 2020)

10	Development of the final evaluation report <sup>15</sup>	Implementation
11	The presentation of the evaluation report	Implementation

The approximation of the number of working days and deadlines per expected result is as follows:

*Table 2: The list of evaluation result and deadlines*

		Approximation of number of days	Deadlines
1.	Kick off meeting.	3	15/01/2025
2.	The inception report.	15	30/01/2025
3.	Data collection and analysis.	28	28/02/2024
4.	The draft evaluation report.	10	10/03/2024
5.	The final evaluation report.	10	20/03/2024
6.	The presentation of the evaluation report.	5	25/03/2024
	Total	71	

<sup>15</sup> **Final evaluation report** - Following the compilation of feedback from the stakeholders and the ERI SEE Secretariat, the evaluator(s) will be invited to review the feedback matrix and finalise the report.

## VII Requirements for the Evaluator(s)

The selected evaluator(s) will adhere to the ethical guidelines (UNEG, 2008) and Evaluation Policy (MFA, 2019) as well as to follow the Guidelines for Project and Programme Evaluations (ADC, 2020) and other relevant guidelines and manuals listed in the section Literature of this ToR. A gender balanced and diverse team is part of the requirements in case of offers involving more than one evaluator (ADC, 2020).

### **Selection criteria for evaluators:**

- Minimum of 10 years of proven experience in education policies implementation and/or development
- Proven experience in the evaluation of projects
  - The team leader should have at least 5 evaluations conducted as a team leader.
  - Links to Evaluation reports already conducted by the team leader and team members should be submitted as references
- Proven experience in projects implemented in the WB region.
- Proven experience in analysing WB regulations and policies.
- Proven experience in crosscutting topics (social and environmental sustainability and gender equality).
- Proven experience in qualitative data collection and analysis
- Fluent use of English language
- Fluency in one or more WB languages will be considered as an advantage.
- Experience in writing scientific papers will be considered as an advantage.
- Experience in activities connecting education and labour market will be considered as an advantage.

## VIII Specifications for the Submission of Offers

Evaluators are requested to submit a technical and a financial offer.

The **technical** offer should present an applicant or a team and describe methods, activities and resources needed for conducting evaluation. It should include the following sections:

1. Presentation of evaluator(s) - educational background, the description of working experience in relation to the selection criteria for evaluator(s). In the cases in which an application is submitted by a team of experts, a division of tasks within the team should be outlined. - Maximum **30** points
2. Proposal of methodological approach - including the description of methods to be implemented, activities (meetings, travels if applicable) the workload (number of days) per each result, the description of resources needed. - Maximum **30** - points
3. Workplan outlining milestones and their deadlines. They should include activities and results outlined in this ToR with additional activities and deadlines anticipated by applicant(s). The workplan should comply to deadlines in
4. Table 2. - Maximum **10** Points
5. Evaluator(s) CV(s) that includes the list of implemented projects and bibliography of each team member. In the case that legal entity is an applicant, both company/research institute portfolio (relevant to the topic) and CVs of the researchers/evaluators that will perform evaluation is to be included. - Maximum **10** Points

A **financial** offer should contain the number of days for each result (Table 2) and the expert's(s') price per day. The financial offer must comply to the deadlines in

Table 2.

The financial offer should outline the following costs:

1. The cost and the number of working days per identified result (
2. Table 2) - Maximum 10 Points
3. The cost and the justification of other costs (communication costs, licences for software, printing costs, travel costs) - Maximum 10 Points

Both financial and technical offer will be graded. An application can receive the maximum of 100 points.

An application containing technical and financial offer must be submitted by **13 January 2025. by 17:00**. Both individual researchers, teams of individual researchers and legal entities are eligible to apply. Only completed offers submitted in time will be considered. Above listed documents must be written in English and submitted by e-mail only.

**Applications** are to be sent to [office@erisee.org](mailto:office@erisee.org) with subject: *Application for EQET SEE External Evaluation*. For additional information regarding this Call, potential applicants can contact the EQET SEE project coordinator Ivana Živadinović ([ivana.zivadinovic@erisee.org](mailto:ivana.zivadinovic@erisee.org)).

## Literature

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ADC **Results Assessment Form (RAF)**

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