

IPA 2008

TERMS OF REFERENCE

**Support for quality assurance within the national
primary and secondary education examination system**

Project budget: EUR 2,000,000

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LIST OF ABBREVIATIONS

CVET	Centre for Vocational Education and Training
DILS	Delivery of Improved Local Services – A project on developing community-based services in education, health and social protection sector that is financed through a sector-investment loan of the World Bank
EAR	European Agency of Reconstruction
EC	European Commission
EU	European Union
IEQE	Institute for Education Quality and Evaluation
IPA	Instrument of Pre-accession Assistance
MoE	Ministry of Education
MoH	Ministry of Health
MoLSP	Ministry of Labour and Social Policy
MoU	Memorandum of Understanding
NGO	Non Governmental Organisation
NPA	National Plan of Action
NIP	National Investment Plan
NQF	National Qualification Framework
PRS	Poverty Reduction Strategy
PSC	Project Steering Committee
SIF	Social Innovations Fund
SWDS	Social Welfare Development Strategy
ToR	Terms of Reference
VET	Vocational Education and Training
UNDP	United Nations Development Programme
UNICEF	United Nations Children’s Fund
WB	World Bank

1. BACKGROUND INFORMATION

1.1. Beneficiary country

Republic of Serbia

1.2. Contracting Authority

EC Delegation to the Republic of Serbia

1.3. Relevant country background

The population of Serbia is 7.37 million, 52% of people live in urban areas, and the negative population growth rate is -0.47%.¹ The literacy is 96.4% (98.9% male and 94.1% female). According to 2002 census there were the following ethnic groups: Serb 82.9%, Hungarian 3.9%, Roma 1.4%, Yugoslavs 1.1%, Bosnians 1.8%, Montenegrin 0.9%, other 8%. Official languages in the region of Vojvodina are also Romanian, Hungarian, Slovak, Ukrainian, and Croatian.²

Serbia has made significant progress with a wide ranging program of democratic and economic reforms which started in 2001. Macroeconomic stability has been restored which provided basis for fast growth of the economy, and incomes have risen strongly. GDP per capita, estimated at €2,940 in 2002, has reached €7,560 in 2007. During the same time period, poverty has fallen from 14 percent of the population to about 6.6 percent (according to last year's Living Standards Measurement Survey)³.

The current economic and financial crisis slows down the economy, puts at risk poverty reduction and affects employment in Serbia. After 5 - 8% during 2004-2007 the GDP growth fell to 2.8% in the last quarter of 2008 and further growth decline projected for Serbia is likely to have substantial impacts.

In the education sector the 2007 budget was 70 billion RSD (approx. 900 million €), 58.5 billion of which was from the public revenue. This covered the financing of activities of the Ministry of Education and educational institutes, as well as funds for education sectors (preschool, primary, secondary and higher education, and student welfare). In the total budget of the Republic of Serbia for 2007, the share of education was 10%⁴. According to the data from the Second Report on the Implementation of the Poverty Reduction Strategy (August 2007), public expenditure for education (% GDP) increased from 2.7% in 2001 to 3.5% in 2006, and a further increase of up to 3.9% is planned for 2009.

Serbia strives for a modern education system which would contribute more efficiently to the economic recovery, in line with the EU policy as formulated in the Lisbon Strategy, support the development of democracy and contribute to the European integration process of the country.

According to the National Strategy of Economic Development of Serbia 2006-2012 the Serbian economy in transition has a low-level and inefficient innovation potential which requires further development to be based on knowledge.⁵

The National Programme for Integration with the European Union⁶ sets the agenda for the integration process in all sectors of economy and society. For education it includes the following short- or mid-term priorities related to quality assurance:

- Introduction of evaluation, self evaluation and development planning for schools

¹ Statistical Office of the Republic of Serbia, January 2008. Census 2002: 7.50 mil., 1991: 7.58 mil;

² CIA – The World Factbook;

³ World Bank 2009, Country Brief Report

⁴ Centre for Education Policy (<http://www.cep.edu.rs/eng/>)

⁵ The National Strategy of Economic Development of Serbia 2006-2012, p. 80-81;

⁶ National Programme for Integration with the European Union (NPI), Government of the Republic of Serbia, May 2008;

- Creation of national final examinations in primary and secondary education
- Development of quality standards for pre-school and primary education, and provision of
- Mechanisms for their implementation
- Definition of National Qualifications Framework
- Establishment of a certification and accreditation system in VET
- Development of education standards in secondary education
- Definition of standards for teachers.

The National Action Plan for VET⁷ adopted by the Government in March 2009 defines as one of the priorities the development of the system of quality assurance and assessment in VET and the corresponding measure includes the improvement of the VET final examinations.

In order to support the education reform in line with the above national strategies the Ministry of Education has currently undertaken a major legislative initiative by substantially revising the laws governing pre-, primary and secondary education: Law on Foundations of the Education System, Law on Textbooks and Other Teaching Aids (available on the Ministry web-site www.mp.gov.rs) have been adopted in August 2009, while the Law on Pupils and Students Standard of Living, and Law on Pre-school Education are in the Parliament procedure.

The new draft Law on the Foundations of the Education System confirms the intention to assure quality in education through self- and external school evaluation, introducing also national examinations at the end of primary and of secondary education (general matura, VET matura and VET final examination).

A recent study⁸ of Serbia's results in the PISA⁹ tests points out that performance of 15 year old students in three surveyed domains (mathematical, scientific and reading literacy) is significantly below the OECD average and also lower than the performance of students in Croatia and Slovenia (mostly in the domain of the reading literacy). It implies that the students in Serbia would require from one to almost three years of additional education in order to catch up with students from these countries. The study recommends developing education performance standards, aimed at the integration of contents and knowledge relevant to the education continuation and everyday life, harmonized with competencies promoted in the EU. It also suggests improving national system of monitoring and evaluation of the education performance through national testing at the end of educational cycles.

1.4. Current state of affairs in the relevant sector

In Serbia the relevant sectors of the education system are the 8-year primary schools providing compulsory education¹⁰ to pupils of 7 - 15 years of age, the 4-year secondary high schools and 3 - 4 year secondary vocational schools. In 2006/07 there were 1791 primary schools (3551 including satellite schools) with 622562 pupils, out of which 79745 in the 8th grade, and 472 secondary (general and vocational) schools with 290387 students, out of which 74504 in the 3rd grade and 53360 in the 4th grade.¹¹ Serbia also has 35 private secondary schools (high schools and vocational schools). In

⁷The National Action Plan for the Implementation of the Strategy for the Development of Vocational Education and Training in the Republic of Serbia 2009-2015;

⁸ Quality and equity of education in Serbia: educational opportunities of the vulnerable, PISA assessment 2003 and 2006 data, Aleksandar Baucal, Dragica Pavlovic-Babic, Poverty Reduction Strategy Implementation Focal Point of the Deputy Prime Minister, Belgrade 2009;

⁹ Programme for International Student Assessment;

¹⁰ In Serbia, nine year primary education is obligatory since the 2006/2007 school year. This period consists of pre-school year for children aged 5.5 to 6.5 years and primary education in the first and second cycle (four + four years);

¹¹ Statistical Office of the Republic of Serbia;

vocational education and training (VET) itself there are over 230000 students in 333 VET schools with approximately 15000 teachers and trainers.

Among other changes, the reform of primary education brought new curricula. One foreign language is obligatory since grade one, and second foreign language is obligatory since grade 5. The health education is integrated into the curricula of the existing subjects. The list of obligatory optional classes and facultative classes was introduced for both cycles. Information technology was introduced to both primary educational cycles.

Primary education for adults¹² is organized in schools for adult education, and it can also be organized in every primary school which has adequate space, equipment and educational materials, as well as curriculum, adequate staff and sufficient number of students.

General secondary education is obtained in high schools with four profiles: general, natural sciences and mathematics, data processing, and social sciences and languages, while there are also specialised high schools for languages and mathematics.

The secondary vocational education is provided in around 250 profiles in a three or four year curriculum. In the VET reform process, 60 new profiles were created and are implemented in 164 schools. The new curricula were developed in cooperation with employers and reflect labour market needs for new or improved knowledge and skills. The role of VET schools is changing, as they have to become more flexible in providing education and training and thus satisfy the labour market needs, including the VET schools function as adult learning centres.

In primary and secondary schools the development of quality is a joint task for school boards, principals and pedagogues, who are also supported by professional bodies of the school. The professional bodies of the school consist of the teacher council (teachers and professional associates), class councils (all teachers of a class), professional councils (teachers of similar subjects) and professional sections for curriculum development and developmental planning.

Quality assurance at the level of schools and other education and training providers is overseen and supported at the national and regional levels. There the Ministry of Education and its primary, secondary and school supervision sectors have a leading role, supported by its 19 regional school directorates. The Institute for Education Improvement is involved through its Centre for Strategic Development, Centre for Curriculum, Centre for Staff Development and Centre for VET. The Institute for Education Quality and Evaluation has a role of defining general education standards and assessing pupils and students' achievement.

In order to promote quality improvement and decide or provide opinion on key matters in education, a National Education Council was formed in 2003, as a partnership body appointed by the Parliament. The tripartite Socioeconomic Council of the Republic of Serbia founded in 2005 deals also with issues of collective negotiation, employment policy, and education and training. In the field of higher education two independent bodies are established: the National Higher Education Council and the Accreditation and Quality Control Commission.

The main focus of this project is the development of a national examination system and increasing the capacity of the Ministry and other relevant institutions to implement this system. The new national examinations will replace the current qualification exam, VET final exam, general matura and VET matura, which have the following characteristics¹³:

Qualification exams at the end of primary school are part of the entrance exam system for the enrolment in secondary schools introduced in 2002/2003. These exams test the knowledge in the Serbian language (or the mother tongue, for national minorities) and mathematics. Secondary schools rank students according to the total number of points scored on the basis of their overall academic results in the 6th, 7th and 8th grade, number of points scored at competitions at the level of the Republic in the eighth grade and number of points scored at the qualification exam.

¹² As found in the 2002 census, around 235,000 people are illiterate, while 24% of the population has only completed the primary school. According to the data of the Statistical Office, the largest numbers of illiterate people reside in undeveloped municipalities.

¹³ Educational assessment, examination and testing overview, Institute for Education Quality and Evaluation, unpublished;

General matura is taken after the completion of high school education and it enables them to proceed to the next level of education. The Law allows students who have completed three-year and four-year vocational secondary education to take the general matura exam.

Vocational matura is taken by students who have completed the third or the fourth grade of secondary vocational school which enables them to enrol in corresponding institutions of higher education in keeping with the prescribed admission criteria. Vocational matura exam consists of two parts, theoretical and practical, and it tests general, vocation related theoretical knowledge and skills, while the practical part of this exam is aimed at testing proficiency in practical vocational skills.

VET final exam is taken after the completion of the three-year secondary vocational education and this exam tests the knowledge and practical skills. Students can take the practical part of the exam in the school and in institutions outside the school, provided that those institutions are certified and follow certified programs.

Though there is not any systematic analysis available of the current examination system, the main rationale for its innovation lies in the outdated qualification examinations at the end of the primary school which do not reflect the new primary education standards already introduced (currently in the grades 1 to 6). For the secondary level the new standards, existing so far at a pilot stage such as described for VET, will be implemented in parallel with introducing the new national examinations.

According to the new draft Law the final examination at the end of primary school will be taken by pupils after completion of the 8th grade. The general matura will be taken by students after completion of the 4th grade of the high school. It can also be taken by students after completion of the 4th grade of the VET school. The VET matura will be taken by students after completion of the 4th grade of the VET school. It can also be taken by students after completion of the 3 year programme of the VET school. The VET final examination will be taken by students after completion of the 3 year programme of the VET school. The programme (content) of final examinations will be proposed by the National Education Council or VET Council and declared by the Minister. General matura and VET matura will enable progression to a corresponding higher education institution without having to pass entrance examinations.

Prior to the starting date of this project the Ministry of Education selects at least 10% of general secondary schools (gymnasium) to be pilot schools. The Ministry will also select at least 10% of elementary schools to be pilot schools for the follow-up of the results of the final exam. Furthermore, the Ministry of Education prepares a model of the final examination at the end of primary education, which will prevent additional drop-out and guarantee equitable access to compulsory education - these are conditionalities for the implementation of the component 1 of the project.

The Law on Foundations of the Education System assume the start of the new national examination at the end of primary school in 2011, and the introduction of the new national general matura, VET matura and VET final examination. This project intervention is scheduled to support the effort of the national education institutions responsible for making this ambitious goal a reality and thus achieve an important step in improving the quality of education and training in Serbia.

Developing and introducing national examinations should go along with additional mechanisms at school level and should be integrated in a wider policy on quality assurance in education and training. School self-evaluation is one such mechanism and the project will contribute to changing the school culture in this respect. Another issue will be the differentiation between high and low achieving schools in terms of average marks, and how to support the improvement of the latter. Last but not least, the reaction of students, teachers, principals and wider public should not be underestimated – an effective information campaign led by the Ministry will be important for understanding, accepting and supporting the changes.

1.5. Related programmes and other donor activities

Modernisation of the vocational education and training system in Serbia
(IPA 2007 VET project)

This project is closely connected to the IPA 2007 VET project, which is to be implemented in the period October 2009 – March 2012, while the intended period of implementation of this project is March 2010 – February 2012. Efficient coordination between the two projects will therefore be of utmost importance.

The IPA 2007 VET project has the following four components:

- Governance
- National Qualifications System
- Quality Assurance
- Continuing Vocational Education and Training.

Specific objectives and expected results for the IPA 2007 VET project two components of Quality Assurance and National Qualifications System closely related to this project are as follows.

To support the development and implementation of a quality assurance system for VET, identifying broad indicators and procedures for an efficient monitoring of the system:

- Under the auspices of the Centre for VET, a quality assurance system for VET designed and under implementation. The possibility to establish an independent accreditation body investigated and recommendations made
- Indicators set up and procedures defined for monitoring and evaluation of the whole system
- Procedures for accreditation of providers and/or programmes established
- Self-evaluation procedures promoted and tested.

To further improve the national qualification system and support the introduction of modernised VET programmes in all schools across at least two economic sectors:

- The National Qualification Framework concept, including post-secondary level, redefined and agreed with the relevant stakeholders and social partners
- Analysis conducted across all economic sectors and two to three sectors identified in which employers are well organised and ready to work on NQF. In these sectors, occupational standards, qualifications and VET standards based on learning outcomes are developed and modularised and teachers trained
- Support provided to the introduction of modernised VET programmes in all schools across at least two economic sectors already involved in piloting phase, teachers trained and equipment procured
- Certification standards are defined for the different qualification levels
- The modularisation of the curricula to be taken further by testing the methodology used for piloting the vocational subject to the general subjects
- Validation of prior/experiential learning mechanisms developed and pilot tested.

Other related projects

EU CARDS 2006 (€ 0.8 million): The third phase of the VET Reform Programme is scheduled to run from May 2008 till June 2009 and is directed, first of all, on the support to the schools that already have pilot profiles, or have the opportunity to apply for one of the pilot profiles. In this phase, 74 further VET Schools are involved in the project.

EU CARDS 2005 (€ 3.2 million): VET Reform programme Phase II – ended in March 2008, aimed to (i) increase the institutional capacity of the Ministry of Education and other national stakeholders to develop and implement appropriate strategy frameworks, including the development of a National Qualifications Framework; (ii) develop and implement new curricula in 22 pilot schools in three economic sectors; (iii) strengthen the operations of five regional training centres for adults; (iv) support implementation of the EIB Education Sector Loan and (v) support tendering of separate IT and specialist VET equipment supply contracts.

EU CARDS 2006 (€ 3 million): Supply of IT and specialist equipment to VET schools.

EU CARDS 2003 (€ 13 million): VET Reform programme completed in November 2005 which provided for (i) capacity building to policy development in the field of VET Reform (covering both initial and adult training); (ii) development and implementation of new curricula in 50 pilot schools in five economic sectors; (iii) transformation of 5 VET schools into regional training centres; (iv) the establishment of an Innovation Fund for schools; and (v) upgrading of the school infrastructure (equipment and other teaching aids plus rehabilitation of buildings).

World Bank (US\$46.4 million): The on going Delivery of Improved Local Services (DILS) project aims to assist the Government to increase the capacity of institutional actors in order to improve access to and the efficiency, equity and quality of local delivery of health, education and social protection services, in a decentralizing environment. The project will achieve this aim by helping to implement systems to compensate for inequalities across municipalities; improving outreach and access through innovation in social service delivery; providing support for new regulatory, oversight and quality assurance roles for state level ministries; and capacity building amongst local self governments and other local service providers (2009-2012).

World Bank: Education Improvement Programme loan aimed at modernising the education system (and including the development of an IT system (not operational at present), establishment of the Center for assessment and standards) Project is finalised.

Institute for Education Quality and Evaluation in cooperation with the Netherlands Inspectorate of Education: Monitoring School Quality in Serbia project (2009-2011) intended to result in defined standards and instruments of external evaluation

German Technical Cooperation Agency (GTZ): funding for an ongoing VET reform project in 35 pilot economic-related schools.

Swiss Agency for Development and Cooperation (SDC): support to the establishment of a teacher training system finalised in 2009. Further support continues.

British Council: project on quality assurance measures in the Ministry of Education.

Canadian International Development Agency (CIDA): operation of an Educator Development Programme providing educational management training for key actors at different governance levels.

Roma Education Fund: Functional Education of Adult Roma People – models of training, monitoring and exams were piloted for the lowest qualification level (assistant bricklayer, assistant cook, etc.). Scholarship and mentoring in Vojvodina region piloted.

Austrian Ministry of Education, the Arts and Culture / KulturKontakt Austria / Austrian Development Agency (ADA): funding and operation of ongoing VET reform projects in pilot business administration and tourism related schools.

2. OBJECTIVE, PURPOSE & EXPECTED RESULTS

2.1. Overall objective

A modern education system in Serbia contributing more efficiently to the economic development, in line with the EU policy as exposed in the Lisbon Strategy.

2.2. Purpose

Support to development and implementation of the Quality Assurance System for general education and Vocational Education Training, giving priority to development of a national examination system and increasing the capacity of the Ministry of Education and other relevant institutions to implement this system.

2.3. Results to be achieved by the Consultant

In order to avoid repetition and give a clear initial overview, the results below are formulated in a way integrating the different types of schools. In section 4.2 these results are disaggregated for each type of school (project component 1 to 3), so that specific activities can be defined.

- National models of the different final examinations either reviewed or developed in cooperation with the staff of MoE, Institute for Education Quality and Evaluation (IEQE) and Centre for VET (CVET) within the Institute for Improvement of Education, commissioned by MoE to work on the different final exams, and trained by the project for the task
- Material for handbooks and instruments for four types of final examinations/matura prepared in cooperation with MoE, IEQE and CVET
- At least 200 trainers trained and training piloted for preparing teachers, school principals and other relevant actors who will implement the different final examinations
- At least two existing databases of the results of students' achievements reviewed in cooperation with MoE, IEQE and CVET to support the different final examinations
- The first run or pilot implementation of the different final examinations analysed and evaluated in 180 elementary schools and selected pilot schools in cooperation with MoE, IEQE and CVET
- 180 elementary schools and selected pilot schools supported in using the results of the final examinations in their self-evaluation
- National qualifications framework under development in two selected sectors linked to the proposed national examinations system in vocational education and training.

3. ASSUMPTIONS & RISKS

3.1. Assumptions underlying the project intervention

- Continued Government commitment to education reform
- Appropriate legislation for establishing the new examinations and procedures is adopted
- Prior to the starting date of this project the Ministry of Education selects at least 10% of elementary schools and general secondary schools (gymnasium) to be pilot schools. Furthermore, it prepares a model of the final examination at the end of primary education, which will prevent additional drop-out and guarantee equitable access to compulsory education - these are conditionalities for the implementation of the component 1 of the project
- Readiness of MoE, IEQE, CVET and other relevant actors to cooperate closely in the delivery of project objectives
- Close coordination with the IPA 2007 VET project.

- Council for Vocational and Adult Education established, as defined in the Law on Foundations of the Education System
- Political and economic stability

3.2. Risks

- Short time frame for the introduction of the new national examinations not fully sufficient for adequate preparation of the target groups
- Delays in the IPA 2007 VET project, e.g. selection of the two sectors of economy in which the VET final examinations will be developed and pilot tested
- The appointed staff of MoE, IEQE, CVET and other relevant actors not enough motivated and/or overwhelmed by other tasks.

4. SCOPE OF THE WORK

4.1. General

Project description

As stated in the overall objective and purpose, this project contributes to modernising Serbian education in the context of the European integration process of the country. It does so by providing expertise and facilitation support towards a quality assurance system in education and training, giving priority to the development of a national examination system and related institutional capacities.

To achieve the defined results the project will review and further develop national models of the different final examinations in cooperation with the staff of MoE, IEQE and CVET, commissioned by MoE to work on the different final exams, and trained by the project for the task. Standards will be developed where possible. Then handbooks and instruments of the different final examinations will be prepared. Trainers will be trained and training piloted for preparing those who will implement the different final examinations. The existing databases of the results of students' achievements will be reviewed, so as to support the different final examinations. The project will analyse and evaluate the first run or trial implementation of the different final examinations and support schools in using the results of the final examinations in their self-evaluation. When appropriate, the national qualifications framework under development will be linked to the proposed national examinations system in vocational education and training.

In the **inception phase** it will be crucial to identify with the Ministry of Education clear objectives of national examinations in line with the strategies of developing the relevant sectors of the education system. The inception period of the project will be important for establishing effective and efficient working links between the project team and the cooperating organisations, namely MoE, IEQE and CVET. It will also confirm the legal and organisational preconditions for the work of the project, especially in terms of the new educational laws, their provisions related to quality assurance and final examinations, and the degree of preparation of Serbian authorities to implement the new final examinations. Assessment of these factors will make it possible for the project to allocate its resources and plan the activities.

The results and respective activities are structured into **four components** of the project: 1 – primary education, 2 – general secondary education, 3 – vocational education and training, 4 – national qualifications framework.

In reviewing and developing the existing concepts of final examinations for the different sectors of education in Serbia it will be important to focus on the 'substance' of the examination process, i.e. what is to be tested and how. What kind of standards? Which competences should be tested? Should there be set up Examination Councils of teachers etc. and how will the project give inputs and guidelines here? How will the difficult process of examination questions, testing answers, checking and re-checking in wider groups be organised? This should be a key aspect of the MoE, IEQE and CVET work on the examination models, methods and instruments assisted by this project.

As regards the component 1, prior to the starting date of this project the Ministry of Education will select at least 10% of elementary schools for the follow-up of the results of the final exam and at least 10% of general secondary schools (gymnasium) to be pilot schools. Furthermore, the MoE will prepare a model of the final examination at the end of primary education, which will prevent additional drop-out and guarantee equitable access to compulsory education. **These are the conditionalities for the implementation of the component 1 of the project and the activities in this component can start only when these conditions have been reached.**

Dissemination will be a cross-cutting activity in all project components. It will need to be properly planned and use variety of tools including ICT, so that appropriate responses can be made to the information needs of the different actors. The project activities and results will be communicated to the public and the different target groups. This will need to be a two way process in which feedback will be sought from organisations and individuals targeted by the project dissemination.

National examinations affect large numbers of young people by influencing their further study and careers. It is therefore vital for them to be well informed so that they can understand the requirements and benefits of the newly introduced final examinations. It will be very important to complement the project dissemination activities with the information provided on this issue by education authorities to the public in general and to the different target groups in particular.

Geographical area to be covered

Most of the project activities will take place in the city of Belgrade, while training and pilot testing will also be carried out outside the capital, on the territory of the Republic of Serbia, as defined by the SC Resolution 1244.

Target groups

- The following institutions and groups will be targeted by the project:
- Ministry of Education (MoE)
- National Education Council
- Council for Vocational and Adult Education
- Institute for Education Quality and Evaluation (IEQE)
- Institute for Education Improvement, including Centre for VET (CVET)
- Regional School Directorates
- Social partners
- Schools at elementary and secondary level
- School principals, teachers, trainers and other staff
- Pupils and students.

4.2. Specific activities

In this section the results of the project formulated in 2.3 are disaggregated into components.

Corresponding specific activities are listed below each result. The inception phase as defined in the project description (Section 4.1.) relates to all the four components below.

Component 1 - primary education

- 1.1 Proposed national model of the final examination at the end of primary education, enabling entrance into secondary education in line with Law on Foundations of Education in Serbia, reviewed before MoE adopts it at the end of 2009/2010, and the staff commissioned by MoE to prepare the final examination trained

- 1.1.1 Assess the proposal for the final examination at the end of primary education prepared prior to this project by the working group established by MoE
 - 1.1.2 Evaluate the elements of the final examination proposal pilot tested in 2009/2010
 - 1.1.3 Review the proposal, including mechanisms for feedback of the final examination results to schools for the purpose of their self-evaluation
 - 1.1.4 Train at least 20 MoE, IEQE and other staff commissioned by MoE to be involved in preparing the final examination and in all stages of its administering
 - 1.1.5 Organise a study visit¹⁴ for the most engaged members of the commissioned staff.
- 1.2 Standards of competences defined
- 1.3 Material for handbooks and instruments of the final examination at the end of elementary education prepared
 - 1.3.1 Develop concepts for at least two handbooks and instruments for the key actors in the final examination as defined in the adopted proposal
 - 1.3.2 Prepare material for handbooks and instruments based on the concept.
- 1.4 Trainers trained and training piloted for preparing teachers, school principals and other relevant actors who will implement the final examination at the end of primary education
 - 1.4.1 Design at least two training programs
 - 1.4.2 Train at least 180 trainers
 - 1.4.3 Delivery of training to teacher trainers, school principals and other relevant actors who will implement the final examination at the end of primary education.
- 1.5 At least two existing databases of the results of pupils' achievements reviewed to support the final examination at the end of primary education
 - 1.5.1 Assess the previously established MoE database of pupils' achievement results within the framework of the unified education IT system
 - 1.5.2 Propose linkages between the unified education IT system and IEQE databases in order to process and analyse results from the final examination in an integrated database
 - 1.5.3 Review the functionality of the integrated database as a tool supporting the final examination implementation.
- 1.6 The first run of the final examination in 2010/2011 analysed and evaluated in at least 180 pilot schools
 - 1.6.1 Analyse and evaluate data from the final examination at the end of 2010/2011
 - 1.6.2 Propose recommendations for improving the final examination
 - 1.6.3 Formulate recommendations for education decision makers to improve the quality of education (curriculum, teaching methods, etc.), on the basis of the final examination results.
- 1.7 The 180 pilot elementary schools supported in using the results of the final examination in their self-evaluation
 - 1.7.1 Prepare relevant information about the final examination results
 - 1.7.2 Formulate an annex to the existing self-evaluation handbook
 - 1.7.3 Train pedagogical advisors for adequate use of the results in external evaluation and self-evaluation of schools.

¹⁴ The study visit shall be organised for 10 persons during 5 working days to an EU member state, or to a country neighbouring with Serbia;

Component 2 - general secondary education

- 2.1 Educational standards and examination system for general matura developed for at least 3 subjects
 - 2.1.1 Build capacity of IEQE and its associates through training in the development of standards and organise a study visit¹⁵ for the most engaged members of the staff
 - 2.1.2 Provide support to developing standards.
- 2.2 Material for handbooks and instruments of general matura prepared
 - 2.2.1 Develop a concept for at least two handbooks and instruments for the key actors in general matura as defined in the examination system for general matura
 - 2.2.2 Prepare handbooks and instruments based on the concept
 - 2.2.3 Review at least two existing databases of the results of students' achievements to support general matura.
- 2.3 Trainers trained and training piloted for preparing teachers, school principals and other relevant actors who will implement general matura
 - 2.3.1 Design training programs
 - 2.3.2 Train at least 20 trainers
 - 2.3.3 Pilot the delivery of training to teachers, school principals and other relevant actors who will implement general matura
 - 2.3.4 Train pedagogical advisors for adequate use of the results of matura for self-evaluation of schools.
- 2.4 General matura piloted and improvements of its procedures and instruments recommended
 - 2.4.1 Pilot test general matura procedures and instruments in at least 15 selected high schools (October/November 2011)
 - 2.4.2 Analyse and evaluate the pilot results and prepare recommendations for improvement
 - 2.4.3 Support pilot high schools in using the results of general matura in their self-evaluation.

Component 3 - vocational education and training

- 3.1 Proposed national examination system in VET reviewed – in two selected sectors
 - 3.1.1 Build capacity of CVET and other relevant actors including social partners through training in the preparation and organisation of VET final examinations and organise a study visit¹⁶ for the most engaged members of CVET, other actors and social partner representatives.
 - 3.1.2 Develop the concept, model and structure of national examinations system in VET.
- 3.2 Material for at least two handbooks and instruments for the implementation of VET final examinations prepared
 - 3.2.1 Develop a concept of at least two handbooks and instruments for the key actors as defined in the examination system for VET
 - 3.2.2 Prepare material for handbooks for examinations for education profiles in the two sectors which develop the NQF
 - 3.2.3 Prepare instruments for examinations for education profiles in the two sectors which develop the NQF

¹⁵ The study visit shall be organised for 10 persons during 5 working days to an EU member state, or to a country neighbouring with Serbia.

¹⁶ The study visit shall be organised jointly for components 3 and 4 for a total of 15 persons during 5 working days to an EU member state, or to a country neighbouring with Serbia.

- 3.2.4 Review existing databases of the results of students' achievements to support VET final examinations.
- 3.3 Trainers trained and training piloted for preparing teachers, school principals and other relevant actors including social partners who will implement VET examinations in the two sectors which develop the NQF
- 3.3.1 Design training programs
- 3.3.2 Train at least twenty trainers
- 3.3.3 Pilot the delivery of training to teachers, school principals and other relevant actors including social partners who will implement VET examinations in the two sectors.
- 3.4 VET examinations piloted in the two sectors and improvements of the examinations procedures and instruments recommended
- 3.4.1 Pilot VET examinations procedures and instruments in selected vocational schools (2010/2011)
- 3.4.2 Analyse and evaluate the pilot results and prepare recommendations for improvement
- 3.4.3 Support pilot vocational schools in using the results of the final examination in their self-evaluation.

Component 4 - national qualifications framework

- 4.1 National qualifications framework under development in two selected sectors linked to the proposed national examinations system in vocational education and training
- 4.1.1 Establish and maintain throughout the project duration effective coordination links with the IPA 2007 project Modernisation of the vocational education and training system in Serbia (IPA 2007 VET project), namely its components National qualifications system and Quality assurance, and their respective Working Groups
- 4.1.2 Involve Centre for VET and social partners in designing and pilot testing a model of final assessment for recognition of non-formal and informal learning as part of the examination system in VET
- 4.1.3 Organise a conference National Qualifications Framework and Quality of Education and Training in Serbia.

In all the project components particular attention should be given to ensuring the sustainability and dissemination of project results. The Consultant must also observe the latest Communication and Visibility Manual for EU External Actions concerning acknowledgement of EC financing of the project (see http://ec.europa.eu/europeaid/work/visibility/index_en.htm).

4.3. Project management

Responsible body

The Operations Section of the Delegation of the European Commission in Serbia represented by the Project Manager is responsible for managing this contract.

The Project Partner is the Ministry of Education, Republic of Serbia.

Management structure

Project Steering Committee (PSC) will supervise the project. During the inception phase, the Project Partner will define and nominate representatives, in consultation with the Consultant and the Contracting Authority, from the institutions to be represented in the Project Steering Committee. The following persons should however as a minimum be involved:

- Contracting Authority;
- Ministry of Education;
- National Education Council;

- Council for Vocational and Adult Education;
- Institute for Education Quality and Evaluation;
- Institute for Education Improvement;
- Institute for Education Quality and Evaluation - Centre for VET.

Representatives from other institutions may be invited to attend as observers.

A senior representative of the MoE will act as the chairperson of the PSC.

The Consultant will be responsible for preparation and distribution of the relevant documents and materials to the PSC members at least 5 working days prior to the PSC meeting, the preparation and circulation of the agenda, writing and distribution of minutes, and follow-up to the Committee decisions. The Consultant has to keep them in a file as project documentation. These tasks will be performed in co-ordination with the Project Partner.

The PSC will meet for the first time upon the submission of the inception report, then in six months intervals from the commencement date, and upon the submission of the final report. Its main functions are:

- To assess project progress and guide it strategically;
- To jointly discuss any critical points or bottlenecks for further project implementation;
- To propose and discuss remedy actions to be taken in order to tackle problems;
- To comment and/or discuss the Consultant's Inception Report and Interim Reports.

Role of the Project Partner in the implementation of the project

The Project Partner (MoE) will:

- Chair the PSC, facilitate the nomination of its members and co-ordinate the aforementioned tasks with the Consultant.
- Appoint a senior member of its staff to liaise with the Consultant and the Contracting Authority, and ensure that staff at appropriate level is made available to work alongside the staff of the Consultant. Staff of the Project Partner shall not be paid from project funds.
- Provide copies of legislation, regulations, studies, reports and other relevant documents necessary for the implementation of the project to project experts.
- Provide logistical support for the various training activities, including assistance in the selection of trainees and participants.
- Provide logistical support for the preparation and implementation of the workshops and project presentations for stakeholders and the public.

The Project Partner should also provide all possible assistance to solve unforeseen problems that the Consultant may face. The possible failure to solve some of the Consultant's problems encountered locally will not free the Consultant from meeting its contractual obligations vis-à-vis the Contracting Authority.

For monitoring purposes monthly meetings will be organised. Furthermore, bilateral meetings between the Consultant and the Contracting Authority will be organised as frequently as necessary.

Facilities to be provided by the Contracting Authority and/or other parties

The Contracting Authority will not be responsible for providing any facilities for the project implementation.

The Project Partner will provide, free of charge to the Consultant, office space, phone, fax and internet access.

5. LOGISTICS AND TIMING

5.1. Location

The project office will be located in Belgrade, in premises provided by the Project Partner. Where applicable, specific meetings, seminars and/or workshops can be arranged in different places throughout the country.

5.2. Commencement date & Period of implementation

The intended commencement date is June 2010 and the period of implementation of the contract will be 24 months from this date. Please refer to Articles 4 and 5 of the Special Conditions for the actual commencement date and period of implementation.

6. REQUIREMENTS

6.1. Personnel

All experts who have a crucial role in implementing the contract are referred to as key experts. The profiles of the key experts for this contract are as follows:

Fluency in both written and spoken English.

Key expert 1: Team Leader – Educational Assessment and Quality Assurance Expert (at least 440 working days over 24 months)

The team leader is required to spend 95% of his assignment in Serbia. The team leader should have the following:

Qualifications and skills

- University degree

General professional experience

- Minimum 10 years of professional experience in the field of education and training
- Minimum 5 years of experience in managing international projects
- 2 years of work experience in transition countries and/or pre-accession countries;
- Experience in managing projects funded within the framework of EU programmes;

Specific professional experience

- Minimum 2 years experience in working with government institutions and/or other stakeholders at national level on the issues related to education quality assurance and preferably national examinations system development;
- Experience in developing educational standards and/or curricula;
- Experience in training design and training management;
- Experience related to development of the national qualification frameworks would be an asset.

Key expert 2: General Education Final Examinations Expert (at least 320 working days over 24 months)

Qualifications and skills

- Masters degree in Education or similar; preferably PhD in Education

General professional experience

- Minimum 5 years of professional experience in the field of general education;
- 1 year of work experience in transition countries and/or pre-accession countries would be an asset;

Specific professional experience

- Experience in developing and administration of final examinations in general education;
- Minimum 2 years experience in test design;
- Experience in developing educational standards and/or curricula.

Key expert 3: VET Final Examinations Expert (at least 300 working days over 24 months)

Qualifications and skills

- University degree in education;

General professional experience

- Minimum 5 years of professional experience in the field of VET;
- 1 year of work experience in transition countries and/or pre-accession countries would be an asset;

Specific professional experience

- Experience in developing and administration of final examinations in VET;
- Minimum 2 years experience in test design;
- Experience related to development of the national qualification frameworks would be an asset.

Other experts

There should be a minimum of 1300 working days for other experts.

CVs for experts other than the key experts are not examined prior to the signature of the contract. They should not have been included in tenders.

The Consultant shall select and hire other experts as required according to the profiles identified in the Organisation & Methodology. These profiles must indicate whether they are to be regarded as key/non key experts and senior/junior so that it is clear which fee rate in the budget breakdown will apply to each profile. All experts must be independent and free from conflicts of interest in the responsibilities accorded to them.

The selection procedures used by the Consultant to select these other experts shall be transparent, and shall be based on pre-defined criteria, including professional qualifications, language skills and work experience. The findings of the selection panel shall be recorded. The selection of experts shall be subject to approval by the Contracting Authority.

Note that civil servants and other staff of the public administration of the beneficiary country cannot be recruited as experts, unless prior written approval has been obtained from the European Commission.

Support staff & backstopping

The Consultant will be responsible for the organisation and implementation of the activities described in these ToR. Especially the Consultant will be responsible for:

- Project backstopping, administration and financial management
- The training materials will be provided to the Project Partner for approval at least two weeks before the planned start of training.

A Project Director from the Consultant's headquarters shall be appointed for the whole duration of the project. He/she shall have the overall responsibility for the smooth and timely implementation of the Project and the efficient use of project funds. The Project Director must be an efficient senior manager with experience from similar assignments.

He/she will have the following responsibilities:

- Co-ordinate the overall project activities from the Consultant's headquarters;

- Ensure proper reporting to the Contracting Authority according to EC reporting guidelines and requirements;
- Ensure co-ordination between the project office, the Consultant's headquarters, the Contracting Authority and the Project Partner;
- Ensure proper administrative control of the project's expenses, preparation of invoices with supporting documentation, and the timely delivery of reports.

The Consultant should hire a local long-term office manager/secretarial support as well as translation support as required in order to allow the professional staff to concentrate on their core tasks. The local long-term office manager will be in charge of the day-to-day management of the office and will, in particular, assist the Team Leader and his/her Deputy in liaison with Project Partner. Preferably he/she should have previous experience in office management in the context of other international, preferably EC supported projects.

The costs of support staff must be included in the fee rates of the experts.

Backstopping and support staff costs must be included in the fee rates of the experts.

6.2. Office accommodation

Office accommodation of a reasonable standard and of approximately 10 square metres for each expert working on the contract is to be provided by the beneficiary country.

6.3. Facilities to be provided by the Consultant

The Consultant shall ensure that experts are adequately supported and equipped. In particular it shall ensure that there is sufficient administrative, secretarial and interpreting provision to enable experts to concentrate on their primary responsibilities. It must also transfer funds as necessary to support its activities under the contract and to ensure that its employees are paid regularly and in a timely fashion. If the Consultant is a consortium, the arrangements should allow for the maximum flexibility in project implementation. Arrangements offering each consortium member a fixed percentage of the work to be undertaken under the contract should be avoided.

6.4. Equipment

No equipment is to be purchased on behalf of the Contracting Authority / beneficiary country as part of this service contract or transferred to the Contracting Authority / beneficiary country at the end of this contract. Any equipment related to this contract which is to be acquired by the beneficiary country must be purchased by means of a separate supply tender procedure.

6.5. Incidental expenditure

The Provision for incidental expenditure covers the ancillary and exceptional eligible expenditure incurred under this contract. It cannot be used for costs which should be covered by the Consultant as part of its fee rates, as defined above. Its use is governed by the provisions in the General Conditions and the notes in Annex V of the contract. It covers:

- Travel costs and subsistence allowances for missions, outside the normal place of posting, to be undertaken as part of this contract;
- Costs for project dissemination and for the conference (rent of premises/equipment, translation of materials, simultaneous translation-if applicable, printing/production of materials, catering services);
- Training/seminar/workshop costs, rent of premises/equipment, translation of materials / consecutive or simultaneous interpretation -if applicable, printing/production of materials, catering services;
- Costs of the study visits
- Costs of design, editing, translation into Serbian language, printing and distribution of the training materials (ToT).

The Provision for incidental expenditure for this contract is **EUR 220,000**. This amount must be included without modification in the Budget breakdown.

Any subsistence allowances to be paid for missions undertaken as part of this contract must not exceed the per diem rates published on the Web site:

http://ec.europa.eu/europeaid/work/procedures/index_en.htm at the start of each such mission.

6.6. Expenditure verification

The Provision for expenditure verification relates to the fees of the auditor who has been charged with the expenditure verification of this contract in order to proceed with the payment of further pre-financing instalments if any and/or interim payments if any.

The Provision for expenditure verification for this contract is **EUR 20,000**. This amount must be included without modification in the Budget breakdown.

7. REPORTS

7.1. Reporting requirements

Please refer to Article 26 of the General Conditions. Interim reports must be prepared every six months during the period of implementation of the tasks. They must be provided along with the corresponding invoice, the financial report and an expenditure verification report defined in Article 28 of the General Conditions. There must be a final report, a final invoice and the financial report accompanied by an expenditure verification report at the end of the period of implementation of the tasks. The draft final report must be submitted at least one month before the end of the period of implementation of the tasks. Note that these interim and final reports are additional to any required in Section 4.2 of these Terms of Reference.

Each report shall consist of a narrative section and a financial section. The financial section must contain details of the time inputs of the experts, of the incidental expenditure and of the provision for expenditure verification.

Inception report:

The Consultant will submit an inception report at the latest eight weeks from the commencement date. This report should include:

- clear objectives of the technical assistance;
- any changes agreed with the Project Partner that were not specified in the ToR;
- an overall plan of action for the whole project duration;
- provide a detailed description of the content of the individual components of the project and detailed work plan (including a timetable for each of the components of the project identified in the activities below, a schedule for the achievement of results, an input schedule, and if necessary, a revised Logical Framework).

The Consultant shall submit the Inception Report to the addressees listed under point 7.2. The Consultant will be expected to have obtained the support of the Project Partner for the Inception Report prior to its submission to the Contracting Authority.

Monthly progress reports:

The Consultant will submit each monthly progress report during the first week following the reporting period. These reports should include:

- A comparison of achievements against planned activities and overall progress against the initial timetable;
- Information on problems encountered during the reporting period, mitigating measures adopted and problems foreseen for the following reporting period, if any;
- A brief overview of the activities planned for the next month;

- Implementation of action plan
- Conducting of trainings

Interim progress reports:

The Consultant will submit the first interim report six months following the project commencement date.

These reports should include:

- A comparison of achievements against planned activities and overall progress against the initial timetable;
- A summary of the financial status of the implementation of the project, including a detailed description of resources utilised against activities undertaken;
- A review of problems encountered during the implementation of the project activities and the corrective measures taken;
- A detailed work plan for the following period and any interim findings or preliminary conclusions.

Final report:

The final report should include:

- Overall financial report
- A complete overview of all activities implemented during the project;
- A summary of outputs, and the identification of any major problems, which may have arisen during the performance of the Contract;
- An assessment of the outcomes of the project measured against the stated project objectives and the indicators of achievement included in the log-frame matrix.

7.2. Submission & approval of progress reports

Two (2) copies of the progress reports referred to above must be submitted to the Project Manager. The progress reports must be written in English. The Project Manager is responsible for approving the progress reports.

All reports shall be submitted in English language in electronic format and hard copies to the following recipients:

- The Head of the Department for EU programmes and programming in education at the MoE;
- The Contracting Authority.

8. MONITORING AND EVALUATION

8.1. Definition of indicators

Some of the objectively verifiable indicators for this project are defined in attached Logical Framework Matrix. The Consultant is requested to elaborate and propose additional indicators along the aforementioned lines if necessary. The indicators could also be adjusted accordingly at the Inception Phase and updated throughout of the project.

8.2. Special requirements

None.