

**Interreg**



Co-funded by  
the European Union

**Central Baltic Programme**

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## **Terms of Reference**

### **Operational Evaluation of the Central Baltic Programme 2021 - 2027**



# 1 Background

## 1.1. Central Baltic Programme 2021-2027

The Central Baltic Programme 2021-2027 is a EU cross-border cooperation programme. Its scope is to finance high quality projects with European Regional Development Funds in Finland (including Åland), Estonia, Latvia and Sweden, that aim at solving common challenges together and across borders. The programme budget for 2021-2027 is 152 million euros from the European Regional Development Fund (ERDF), which can be applied for in the calls.

The [Programme document](#) defines in detail the structure and functions of the Central Baltic Programme 2021-2027. It was adopted by the European Commission on 7 June 2022 and updated on 15 December 2023. Programme document sets the Programme strategy, justification of the programme objectives and defines the expected results of the Programme.

Central Baltic Programme funds projects in seven programme objectives. The aims of the programme are defined as Programme Objectives and are illustrated through the result indicators.

The result indicators capture the change that the programme wants to achieve in the region. As projects are assessed based on their relevance for the programme and on how well they help the programme reach its objectives, projects should directly contribute to the result indicators to be funded.

Programme objectives and expected results of Central Baltic programme 2021 - 2027 are:

1. MORE EXPORTS BY SMEs - As a result, companies achieve sales and contracts on target markets.
2. MORE NEW SCALED-UP GROWTH COMPANIES - As a result, companies achieve scaled-up status as, for example attract investment, develop new product or expand their team.
3. JOINT CIRCULAR ECONOMY SOLUTIONS - As a result, product and service cycles and chains are improved.
4. IMPROVED COASTAL AND MARINE ENVIRONMENT - As a result, the load of nutrients and other harmful substances to the Baltic Sea is reduced from various sources.
5. DECREASED CO2 EMISSIONS - As a result, CO2 emissions are reduced from intermodal transport nodes and areas.

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6. IMPROVED EMPLOYMENT OPPORTUNITIES ON LABOUR MARKET - As a result, people's competitiveness on labour market and entrepreneurship capabilities are improved and additional anti-discriminatory policies are applied by organisations.

7. IMPROVED PUBLIC SERVICES AND SOLUTIONS FOR THE CITIZENS - As a result, solutions are taken up or upscaled by organisations.

Central Baltic Programme has already a long history. The programme has been existing in its current form from 2007 and cooperation links in the region are well established and developed. The region has formed into a functional cross-border cooperation area with joint interests, striving for cohesion.

In continuation of the previous cooperation programme, the participating regions in the Central Baltic Programme 2021-2027 are situated in Estonia, Finland including Åland, Latvia and Sweden.

In total there are 29 regions in the [programme area](#) - according to the European Union Nomenclature of Territorial Units for Statistics by regional levels 3 classification (NUTS 3).

The official language of the programme is English.

Programme is implemented by the Managing Authority/Joint Secretariat, hosted by the Regional Council of Southwest Finland. Several other [bodies](#) are also involved in programme implementation like Monitoring Committee, National Contact Points, Audit Authority, and First Level Controllers.

The Programme Monitoring Committee has approved a [Programme Manual](#) for the project applicants and beneficiaries. The Manual sets out the main procedures and rules of the programme. [Guides for Applying for a Project](#) provides practical level guidance to potential applicants. [Guide for Project Implementation](#), on the other hand, provides practical guidance to projects about different phases of project implementation.

[Central Baltic programme website](#) serves as a main gateway to the Programme.

## 1.2. The regulatory framework for the evaluation and Programme Evaluation Plan

The main EU legal provisions that regulate the evaluation process and are relevant for the scope and contents of this assignment are:

- [Regulation \(EC\) 2021/1059](#), in particular Article 35 specifying requirements concerning evaluation during the programming period; the responsibilities of the managing authority with regards to drawing up the evaluation plan. Article 36 of this regulation covers the responsibilities of managing authorities and partners with regard to transparency and communication with includes the publishing of evaluation findings.

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- [Commission Staff Working Document \(SWD \(2021\) 198 final\)](#): Performance, monitoring, and evaluation of the European Regional Development Fund, the Cohesion Fund, and the Just Transition Fund in 2021-2027, Brussels, 8.7.2021.

Programme Evaluation Plan (Annex 1) is drawn according to the above regulation. Evaluation plan supports the result-orientation, the impact, and the quality of the design and implementation of the Programme. Evaluation Plan ensures that systematic assessment of the Programme using evaluation techniques and methodologies takes place and provides evidence on relevance, complementarity, effectiveness, efficiency, and the impact of the support provided by the Programme for purposes of learning, further development of the Programme and for purposes of the communication of results and impact of the Programme.

Evaluation activities are coordinated by Managing Authority / Joint Secretariat of the Programme.

Evaluation plan foresees two evaluations to be carried out during 2021 - 2027 programme period, first to focus on implementation of the Programme, second on impact of the Programme.

## 2 Objectives and scope of the evaluation

Overall objective of this evaluation is to assess all aspects of Central Baltic programme implementation for the purpose of stock taking, learning, and further development of the Programme. It is expected that results of this evaluation could feed into programming of next Central Baltic programme as well.

This evaluation is to focus on full cycle of programme implementation including programme design, programme visibility and communication, project application and selection, project implementation and reporting, support to projects, as well as visibility and sustainability of project results.

Additional goal of this evaluation is to assess the wider impact of the Central Baltic programme of previous programme periods on the programme area and specific sectors of economy, to the extent possible.

The evaluation covers Central Baltic programme 2021 - 2027 unless a specific evaluation question suggests otherwise.

Specific evaluation questions are given below.

### Operational evaluation questions

1. To what extent is programme **visible** for potential applicants? Does programme ensure clear and understandable **information** about project application and project selection? Which **communication channels** work best and for whom? Are there possibilities for improvements?

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2. Is the **application procedure** clear and understandable to potential applicants? To what extent are project applications easy to prepare and submit? What could be improved? If to compare one-step and 2-step approach - does one step approach allow for better quality of project applications and quicker funding decisions? What could be considered pros and cons of each of the options and why?
3. Is **support** provided to applicants during application procedure sufficient and targeted enough? Do potential project applicants understand it, use it for their benefit and to what extent does it improve the quality of applications? Are there possibilities for improvements?
4. Did **targeted call to border regions** allow to cover needs of the border regions and did Programme contribute to involve the border regions? How successful are project applicants from enlarged Programme territory compared to applicants from EU external border regions and project applicants in general? Which types of applicants and from which regions are more successful in certain programme objectives and thematics, and why?
5. To what extent does the **assessment procedure** allow for selection of relevant projects? Is the assessment procedure clear, understandable and transparent? Are there possibilities for improvement of assessment methodology?
7. To what extent does Programme procedures allow for easy and efficient **project implementation, monitoring, and reporting**? Are the procedures clear and understandable? What are the most common barriers and obstacles and are there possibilities for improvement of procedures regarding implementation, monitoring, and reporting? To what extent is the flexibility rule and **project modification** in general clear to projects and are there any potential improvements for a smoother and more efficient approach?
8. To what extent do the **communication activities and tools** (incl. programme website and social media channels) serve the objectives of the programme ensuring the visibility of the programme and other aims of the communication? Is programme communication clear and understandable to the target audience? What works best and for whom? Are there any possibilities to improve?
8. Are projects visible to their target groups and general public? Which communication and visibility measures by the projects could be considered a good practice and why? To what extent does programme ensure **visibility of results and achievements** of projects? To what extent does programme ensure re-use of project results? Which activities and for whom would be the most relevant to capitalise project and Programme results with the aim of policy development at a relevant scale?
9. How do projects plan to ensure **sustainability** of project results and **durability** of activities, outcomes or outputs after projects have finished? What will foster it and what will hinder it? Are there practices worth highlighting? How do projects ensure positive

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impact on **horizontal principles** promoted by the programme? Could there be any possibilities for improvements?

### Impact evaluation questions

1. Is programme **intervention logic** clear and straightforward? What works and what works not for each of the programme objectives? Are there any improvements needed?
2. Is the programme relevant to the current and upcoming **needs and challenges** in the region, including needs of EU external border regions? What needs and challenges might there be relevant for the Central Baltic programme, especially thinking of post2027 period? Could there be any other regions relevant to join the Central Baltic programme area and why?
2. To what extent do the **output and result indicators** reflect the expected programme objective aims and the needs and challenges of the regions? Are the procedures related to reporting the indicator values clear, easy to follow and understandable for projects? Are there possibilities for improvements both in respect of selection of indicators and reporting of those?
4. Are there examples of project results directly **contributing to local, regional, national or EU level strategies**, incl. sectoral, in the region? What are the best practice examples and what would be the most relevant activities to ensure the contribution? Which EU level strategies is programme most suited to contribute and how?
5. Are there examples of projects benefitting from the **complementarity with other funding opportunities**, including national programmes and other Interreg programmes in the region? What, if any, are the barriers for that?
6. What is the **net impact** of Central Baltic programme (of previous programme periods) up to now in different sectors of economy and in different regions? To what extent are the results of finished projects sustainable? Are there any improvement possible to ensure the sustainability, durability, and usability of CB project results in areas of programme objectives?

## 3 Methodology and available data

### 3.1. Methodological approach

For the evaluation, a theory-based approach is assumed. The evaluator shall select the methodology that is considered the most appropriate in achieving the aim of the evaluation. The methodology shall reflect existing information sources, the need to search for additional information as well as the scope of the planned interventions (projects). An overview of the intended methods and techniques of evaluation, including the planning and structuring of the



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evaluation, conducting interviews and surveys, and data collection and analysis of the information shall be provided in the submitted tender.

The proposed methodology should be a mix of relevant approaches. In addition to desk-based research, interviews or surveys with relevant stakeholders should be foreseen along with data gathering and analysis. Relevant stakeholders for interviews or surveys can include representatives of the Programme staff, the members of the Monitoring Committee, project partners, beneficiaries, end users and other stakeholders.

The evaluator shall describe the methodology including the envisaged format of presenting the results in detail in an inception report.

### 3.2. Available data

The evaluators are expected to familiarize themselves with and take into account in their offer at least the following:

- Information available on [Central Baltic webpage](#), especially that in sections “For applicants” and “For projects”, as well as general information about the programme.
- [Programme document](#)
- [Programme Manual](#), which includes Indicator fiches.
- [Guide for Applying for a Regular Project and Guide for Applying for a Small Project](#)
- [Project idea form](#)
- [Guide for Project Implementation](#)
- Central Baltic Regional Analysis (Annex 2)
- Performance Framework Methodology (Annex 3)
- Communication Strategy, its Communication Objectives and result indicators (Annex 4)
- Capitalisation Plan (Annex 5)
- Central Baltic programme [2014 - 2020 projects and results](#)
- Central Baltic programme [2007 - 2013 projects and results](#)

Once the evaluator has been contracted, the programme will make available to the evaluators:

- Access to Central Baltic project monitoring system Jems where project application forms and reports are available if that would be requested.
- Contact information to lead partners, project partners, members of the Monitoring Committee.

In general, the evaluator shall be provided access to programme-related information and data where necessary for the fulfilment of the tasks described above.

### 3.3. Foreseen budget

The programme has reserved up to 120 000 eur (VAT 0%) for this evaluation.

## 4 Requirements for the service provider

The following criteria will be assessed:

#### 4.1. The experience and qualifications of the staff:

- Proven good knowledge of English is a required qualification;
- The team will be evaluated based on proven knowledge of and experience in all Central Baltic programme area countries (demonstrated through academic or professional work in the last 2-3 years at least),
- Experience with impact evaluations in a relevant field with references listed (at least 3 relevant evaluations should have been finalised in the last 2-3 years), Proven knowledge of the thematics of the Central Baltic programme evaluation Proven knowledge of Interreg programmes, their context and requirements.

CV's for the staff involved in the work must be provided to verify this point.

(15%), maximum score 60 points.

4.2. An evaluation proposal, explaining the chosen methodology to cover the information provided in chapter 2 Objective and scope of the evaluation as well as other relevant parts of this Term of reference.

- The proposal shall consist of a proposal for how to address the evaluation objectives and each of the evaluation questions, present a sound evaluation methodology, suitable evaluation tools, and implementation schedule.

(35%), maximum score 140 points.

#### 4.3. Price of the service (50%), maximum score 200 points

- The price must be given as a total estimated cost of the service. The price shall be given without VAT (VAT 0%). In addition, a rate for additional work may be provided, together with an explanation of how or when such an option would be considered relevant.

The assessment of the criteria will be done based on a quality evaluation of the criteria 4.1. and 4.2. so that the top bidder receives 100 points, the following 90 and so on always with a difference of 10 points.

The score for criteria 4.3. will be calculated with the formula:  $\text{cheapest offer} / \text{offer} \times \text{maximum score}$ .



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Based on the assessment of the offers the one with the highest score will be awarded the contract. The content assessment will be done by the MA/JS. The official decision about the chosen offer will be done by the Board of the Regional Council and the contract shall be signed after the appeal time of 2 weeks has passed, provided that no appeals have been received.

## 5 Duration and workflow of services

The work is expected to start immediately after the contract has been signed. This is foreseen to take place in June 2025.

The work shall start with an inception phase.

- A kick-off/inception meeting is expected to take place shortly after the contract has been signed. At this meeting all relevant elements of the evaluation assignment will be discussed, particularly the evaluation questions, methodological approach and tools, detailed time plan, as well as specific contents of the tasks to be implemented.
- Following the inception meeting, the evaluator will be requested to provide an Inception Report within a month within one month of the entry into force of the contract. This document must state in detail what is expected from this assignment, the points in time at which the different activities will be performed, and the process through which the evaluation reports will be produced.

The Inception report shall describe among other things the following:

- Details on the methodology and tools applied for the execution of the assignment, including the proposed sources of information and data collection procedure for each evaluation question.
- Detailed schedule for the tasks to be undergone (work plan), the activities to be implemented and the respective milestones and deliverables for the whole evaluation.
- Description of the work flows and interactions with the programme bodies
- Description of the role and responsibilities of each member of the evaluation team
- Additional information requirements and the purpose of those, specifying how information and data will be collected.
- Any potential limitations to the tasks foreseen and strategy to overcome those.
- Any other relevant information

The Inception report shall be discussed in detail with the programme's representatives to discuss any comments and suggestions to the evaluator including those related to methodology, information, data, and workflows among other topics. The Inception report shall be presented by the evaluators to the Programme Monitoring Committee.

Comments and suggestions made by the programme representatives and the Monitoring Committee shall be taken into account during the implementation phase to the extent possible.

After Inception report has been approved, an implementation phase shall start.

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During the implementation phase the work plan and its timing shall be updated/fine-tuned along the contract duration in order to adapt it to the actual progress of the evaluation exercise.

To facilitate evaluators work, a meeting to discuss the progress of the evaluation shall be scheduled once each 2-to-3-month period.

Approximately 2 weeks before submission of the Draft Evaluation Report, a coordination meeting will be organised in order to discuss conclusions of the evaluation, how they answer the evaluation questions, and to better steer the evaluator on the feasibility of possible solutions/recommendations deriving from the evaluation.

### Deliverables

The following compulsory deliverables are to be submitted by the evaluator:

- Inception Report (minimum 10 standard A4 pages).
- Presentation of Inception Report to the Programme Monitoring Committee.
- Draft Evaluation Report (minimum 50 standard A4 pages). The Draft Evaluation report has to contain an executive summary of max. 5 pages and infographic for each of the evaluation question unless agreed otherwise during the evaluation period.
- Presentation of the Draft Evaluation Report, main findings, and recommendations to the Programme Monitoring Committee.
- Final Evaluation Report (taking into account Programme Monitoring Committee comments).

The final reports should include among others the following:

- o executive summary;
- o evaluation purpose and methodology;
- o findings and conclusions;
- o recommendations where those have been required according to evaluation questions;
- o proposed follow up measures, if relevant
- o infographics outlining the findings and recommendations
- o HD format videos.

The draft evaluation report with findings and recommendations shall be made available to the Central Baltic programme in March 2026. After comments, the final evaluation report with findings and recommendations shall be presented by the evaluators in the Programme Monitoring Committee meeting in April - May 2026. The evaluators shall then take into account feedback of the Monitoring Committee and provide final deliverables by 13 June 2026.



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In the final evaluation report results of the evaluation shall also be visualised in diagrams, tables, and maps to provide a complete overview of the findings for the whole programming period. Final evaluation report should include a summary of not more than 5 pages provided in Word and Power Point slide format. An infographic with main results shall be prepared for each evaluation question along with 3 up to 45 seconds HD videos with the aim to showcase the most important results of the evaluation. At least 2 of the videos shall be prepared in a factual story telling structure and should include project examples showcasing programme net impact. Structure and script of the videos shall be agreed with the Programme before the production can start.

## 6 Terms of payment

Payments are foreseen in instalments upon finalisation of the deliverables:

- 20% of the total price is to be paid upon invoice by the contractor once the Inception report has been approved by the MA
- 80% of the total price is to be paid upon invoice by the contractor once the final evaluation report has been approved by the MC and the MA

## 7 Submitting the offer

The offer shall be provided in English. The offer shall clearly specify the service provided as well the compliance with the assessment criteria, taking into account the specifications provided for each criteria.

The offer shall be sent by 24 April 2025 by 12:00 Finnish time to

[kirjaamo@varsinais-suomi.fi](mailto:kirjaamo@varsinais-suomi.fi) or

Kirjaamo

Varsinais-Suomen liitto

P.O. Box 273

20101 Turku, Finland.

The e-mail or envelope shall be marked with "Central Baltic 2021-2027 operational evaluation".

The offer must be valid for at least 3 months after the deadline.