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ANNEX 3

to the Commission Implementing Decision on the financing of the multi-annual action plan for Global Challenges (Partnerships) for 2024 -2026

Action Document for Institutional capacity building through Technical Assistance and Information Exchange Instrument (TAIEX)

MULTIANNUAL PLAN

This document constitutes the multiannual work programme within the meaning of Article 110(2) of the Financial Regulation, within the meaning of Article 23(2) of the NDICI-Global Europe Regulation.

1 SYNOPSIS

1.1 Action Summary Table

1. Title CRIS/OPSYS business reference Basic Act	Institutional capacity building through Technical Assistance and Information Exchange Instrument (TAIEX). OPSYS/CRIS number: ACT-62482 Financed under the Neighbourhood, Development and International Cooperation Instrument (NDICI-Global Europe)
2. Team Europe Initiative	No, however the action may support capacity building needs in the context of various Team Europe Initiatives
3. Zone benefiting from the action	The action shall be carried out globally.
4. Programming document	NDICI-Global Europe Multiannual Indicative Programme (MIP) for Global Challenges Thematic Programme 2021 – 2027
5. Link with relevant MIP(s) objectives / expected results	Partnerships pillar; Specific objective 2: Stronger economic governance and inclusive societies. This action will reinforce partner countries' administrative capacity through provision of EU public sector expertise and knowledge transfer, in particular through the well established peer-to-peer instrument, organised globally (result 3).
PRIORITY AREAS AND SECTOR INFORMATION	
6. Priority Area(s), sectors	Priority area 4: Partnerships. Sector: 430 – Other Multisector
7. Sustainable Development Goals (SDGs)	Main SDG: SDG 17 on partnership for the goals Other significant SDG's:

	SDG 5 (Gender Equality) SDG10 (Reduced Inequalities) SDG 16 (Peace, Justice, and Strong Institutions) Other significant SDGs (up to 9) and where appropriate, targets: all other SDGs			
8 a) DAC code(s)	43010 – Multisector aid			
8 b) Main Delivery Channel	European Commission – Development share of budget – 42001			
9. Targets	<input type="checkbox"/> Migration <input type="checkbox"/> Climate <input checked="" type="checkbox"/> Social inclusion and Human Development <input checked="" type="checkbox"/> Gender <input type="checkbox"/> Biodiversity <input type="checkbox"/> Education <input checked="" type="checkbox"/> Human Rights, Democracy and Governance			
10. Markers (from DAC form)	General policy objective	Not targeted	Significant objective	Principal objective
	Participation development/good governance	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Aid to environment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Gender equality and women's and girl's empowerment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Trade development	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Reproductive, maternal, new-born and child health	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Disaster Risk Reduction	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Inclusion of persons with Disabilities	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Nutrition	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	RIO Convention markers	Not targeted	Significant objective	Principal objective
	Biological diversity	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Combat desertification	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Climate change mitigation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Climate change adaptation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Internal markers and Tags:	Policy objectives	Not targeted	Significant objective	Principal objective
	Digitalisation	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	digital connectivity digital governance digital entrepreneurship digital skills/literacy	YES <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	NO <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	

	digital services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	Connectivity	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	digital connectivity	YES	NO	
	energy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	transport	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	health	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	education and research	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	Migration	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Reduction of Inequalities	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Covid-19	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BUDGET INFORMATION				
12. Amounts concerned	Budget line(s) (article, item): 14 02 02 43. Total estimated cost: EUR 8 200 000 Total amount of EU budget contribution: EUR 8 200 000 The contribution is for an amount of EUR 3 755 995 from the general budget of the European Union for financial year 2024 and for an amount of EUR 2 444 005 from the general budget of the European Union for financial year 2025 and for an amount of EUR 2 000 000 from the general budget of the European Union for financial year 2026, subject to the availability of appropriations for the respective financial years following the adoption of the relevant annual budget, or as provided for in the system of provisional twelfths.			
13. Type of financing	Direct management through: - Procurement			

1.2 Summary of the Action

<p>The overall aim of TAIEX, as part of the institution-building instruments, is to provide peer-to-peer technical assistance and capacity building to support partner countries in the harmonisation of their regulatory frameworks and sustainable policy reform and to share best practices in EU policy-related fields, according to the justified demands and priorities of duty bearers from partner countries and the strategic priorities of the EU, also in line with EU values (e.g. promotion of human and fundamental rights, including gender equality, and inclusion). As a result, the instrument contributes to strengthening inclusive societies and good governance in partner countries.</p> <p>TAIEX is a key institutional capacity-building enabler for Global Gateway priority sectors (digital, climate and energy, transport, health, education) in partner countries, and can facilitate improvements in their regulatory environment and help increase their attractiveness for private investments. It provides short and medium-term, needs-driven, and strategically oriented assistance. It complements and works alongside other programmes to help partner countries reinforce their institutions and support sustainable policy reforms. As such, TAIEX brings enhanced capacity for the partner countries' institutions in policy development, in a Team Europe approach, fostering partnerships and improving know-how and information on the priority sectors of Global Gateway (see above).</p> <p>TAIEX has a longstanding and successful track record of deploying public expertise since 1996, particularly Enlargement and Neighbourhood countries. Since 2020, it has been available also for other third countries.</p>

The assistance is provided mainly by EU public sector experts, who share their knowledge and experience with right holders and duty-bearers through workshops, expert missions, study visits and work from home. These activities aim to share with partners experience, know-how and information on EU policies, EU legislation and its application to assist institutions in strengthening good governance and to introduce required changes in line with the priorities and commitments set between the partner countries and the EU

In specific circumstances, when expertise in a partner country is of particular significance to other partner countries and provides added value, experts from a relevant partner country can take part in the activities to provide expertise in sustainable policy reforms and standards in line with the EU's Global Gateway strategy. This participation effectively complements the knowledge provided by EU Member States' experts, which remains the core of the activities of TAIEX, while developing a multi-stakeholder approach enriching the instrument with other forms of peer learning (trilateral or "South-South" cooperation).

TAIEX enhances a Team Europe approach to technical cooperation by providing a mechanism to quickly mobilise public expertise from all Member States, including those that may not have significant development cooperation structures, Official Development Assistance (ODA) or presence in partner countries.

TAIEX promotes European standards, norms, and policy models by providing technical assistance through the public sector. As such, the instrument enhances EU policy strategies (including the Gender Equality Strategy 2020-2025), supports the EU Global Gateway Strategy through capacity building and enhancing reforms, and promotes an enabling environment in critical EU priority sectors. TAIEX is also aligned with the promotion of the Global Gateway principles such as democratic values and high standards; good governance and transparency; equal partnerships; green and clean; and catalysing private sector investment, in line with the mainstreaming of cross-cutting issues (see also section 3.3).

This action is contributing to the priorities of the EU's Gender Action Plan III (GAP III), in particular under thematic area "Addressing the challenges and harnessing the opportunities offered by the green transition and the digital transformation, Digitalisation, Climate change and environment" and "Promoting economic and social rights and empowering girls and women".

2 RATIONALE

2.1 Context

The NDICI-Global Europe's Global Challenges Programme is dedicated to enhancing the European Union's role as global actor and advancing the UN 2030 Agenda; the Paris Agreement and the Kunming-Montreal Global Biodiversity Framework. Its goals include eradicating poverty, reducing gender inequalities, promoting inclusive societies and sustainable development. Aligned with the 2030 Agenda's key themes—People, Planet, Prosperity, and Partnership—the Global Challenges Programme aims to address the Sustainable Development Goals (SDGs).

Within the Partnership pillar of the Global Challenges Programme's Annual Action Programme, the focus is on bolstering the EU's global involvement. The objective is to foster more efficient and inclusive global and multilateral networks, dialogues, and shared responsibility. These global partnerships align with the Global Gateway objectives, emphasizing sustainable and trusted connections that benefit both people and the planet.

Particularly, the Technical Assistance and Information Exchange Instrument (TAIEX) plays a crucial role in strengthening partnerships and dialogues with institutions in partner countries. It aligns with EU policy priorities, supporting partner countries in building back better and implementing policy reforms for sustainable development. TAIEX's flexibility, complemented by other tools like Twinning, budget support, contributes to achieving the targets set out in NDICI-Global Europe.

TAIEX provides capacity-building and complements other implementation tools by offering tailored public sector expertise. It supports peer learning methods and involves experts from beneficiary countries, encouraging a multi-stakeholder approach. TAIEX addresses demand-driven activities and strategically oriented initiatives, focusing on the Global Gateway priority sectors and beyond.

The instrument comes in various formats and covers all areas of EU policies. It supports partner administrations through workshops, seminars, expert missions, study visits, and written input. TAIEX is adaptable to different needs, from broader training in EU legislation, standards, and policies to more specialized requirements.

Furthermore, TAIEX contributes to Team Europe Initiatives (TEIs) and Global Gateway actions by facilitating dialogue, sharing European models and standards, and bridging knowledge gaps. Notable examples include contributions to TEIs on Green transition and digitalization in Latin America and the Caribbean, as well as a Global Gateway action on green bonds in Tanzania. The expectation is that TAIEX will reinforce the EU's global standing, and contribute to making it a trusted partner, and credible interlocutor, in accordance with the Global Gateway principles. The use of public sector expertise reflects a shift from traditional financial cooperation to policy-based cooperation, aligning with EU policy objectives.

2.2 Problem Analysis

Short problem analysis:

The achievement of sustainable development goals hinges on partner countries taking ownership of their development objectives, demonstrating transparency, and being accountable to stakeholders. Key contributors to this are capacity building and public institutional partnerships.

TAIEX, functioning as a public peer-to-peer capacity-building tool, is well-positioned to meet these needs. It operates primarily on the demand of the beneficiary organization in partner countries to ensure full support and ownership.

Furthermore, there is a need for the EU to actively promote European policy objectives, models, and expertise. Strategic TAIEX events, initiated by EU bodies, are effective in this regard, fostering communication through institutional partnerships between EU Member States and public organizations in partner countries.

The instrument's flexibility allows assistance to be tailored to the specific needs of duty bearers, whether they require expertise on a precise policy area or a series of events for broader, long-term goals. TAIEX's assistance model enables swift responses to urgent beneficiary needs.

For meaningful improvements and broader public administration reforms, the mobilization of added-value public sector expertise should facilitate exchanges among duty bearers. In exceptional circumstances, the participation of experts from duty bearers complements TAIEX activities, fostering regional cooperation and a more effective assistance approach.

TAIEX's priorities and objectives align with overarching EU key priorities, contributing to resilient, sustainable, gender mainstreamed and inclusive economies, and societies, particularly in the post-pandemic context. Strong and reliable public institutions are deemed critical in all these efforts, and TAIEX activities bring essential public expertise.

The ongoing digital transformation within TAIEX necessitates increased online capacities and digital working methods, demanding continual adaptation.

Identification of main stakeholders and corresponding institutional and/or organisational issues (mandates, potential roles, and capacities) to be covered by the action:

The main stakeholders of this action are:

As Duty bearers;

Central authorities of EU member States, as assistance is provided by EU public sector experts, encompassing workshops, expert missions, study visits, and remote work. In specific cases, participation of experts enhances the multi-stakeholder approach. Furthermore, TAIEX targets national, regional, and local public administrations of all EU partner countries under the NDICI-Global Europe Regulation.

TAIEX interventions are closely coordinated with EU Delegations, Commission Headquarters, and the European External Action Service. Each TAIEX request is assessed for alignment with national and regional strategies and policy priorities, supporting all priorities in the NDICI-Global Europe Regulation. The implementation is guided by a network of National Contact Points in EU Member States and partner countries, ensuring high-quality expertise and practical and political guidance in institutional building.

As Right -holders:

Civil society organizations and organizations of women's human rights and of people with disabilities.

3 DESCRIPTION OF THE ACTION

3.1 Objectives and Expected Outputs

The Overall Objective (Impact) of TAIEX is to contribute to strengthening inclusive societies and good governance in partner countries.

The Specific Objectives (Outcomes) of this action are to:

1. Contribute to conducive environments for policy reform and private sector investment in line with the Global Gateway principles, international standards and policy models with gender sensitive approach.
2. Enhance effectiveness of partnerships and cooperation between the EU, EU Member States and partner country' administrations
3. Foster the strategic priorities of the EU and promote EU values, in line with the Global Gateway 360° strategy.

The Outputs to be delivered by TAIEX contributing to the corresponding Specific Objectives (Outcomes) are:

- 1.1 Enhanced capacity of the partner countries' institutions in policy development and attracting private sector investment with gender sensitive approach and including people with disabilities,
- 1.2 Partner countries have improved access to know-how and information on EU-policies, legislation and public administration reform best practices
- 1.3 Partnerships between the EU, EU Member States and partner country administrations.

3.2 Indicative Activities

Upon the request of duty bearers from partner countries, TAIEX mobilises sectoral experts primarily from EU Member State administrations and, when applicable, regional or local administrations. This initiative provides the public officials with opportunities for peer exchanges. The experts involved are drawn from the public sectors of EU Member States and, in specific instances, from partner countries. In rare cases where the required expertise is unavailable from Member States' public institutions, it may be sourced from the private sector.

In addition to responding to duty bearer's requests, strategic TAIEX events can be solicited to support key EU policy objectives. TAIEX experts disseminate their knowledge and experience through various channels such as workshops, expert missions, study visits, and remote collaboration, depending on the beneficiary organization's needs and the intervention's scope and nature. The approval of requests follows a demand-driven approach, allowing for the possibility of organizing a series of events. These activities contribute comprehensively to all three specified outputs.

During these events public sector experts from EU Member States institutions are brought in close contact during several days with their peers in the relevant beneficiaries. The EU experts prepare an agenda for the

meeting, in cooperation with the duty bearers and the Commission. After the meeting, the EU experts prepare a report with recommendations on follow up.

The commitment of the EU's contribution to the Team Europe Initiative to which this action refers, will be complemented by other contributions from Team Europe members. It is subject to the formal confirmation of each respective member's meaningful contribution as early as possible.

In the event that the TEIs and/or these contributions do not materialise, the EU action may continue outside of a TEI framework.

In addition, TAIEX supports Output 1.3 by facilitating exchanges between the National Contact Points on TAIEX and Twinning in EU Member States and partner countries.

3.3 Mainstreaming

Environmental Protection & Climate Change

Outcomes of the EIA (Environmental Impact Assessment) screening

The EIA (Environment Impact Assessment) screening classified the action as Category C (no need for further assessment) as it is not environmentally sensitive and in accordance with the applicable legislation.

Outcome of the CRA (Climate Risk Assessment) screening

The Climate Risk Assessment (CRA) screening concluded that this action is no or low risk (no need for further assessment) as it is not environmentally sensitive and in accordance with the applicable legislation.

The action being cross-cutting, it should ensure environmental and climate considerations are mainstreamed into all activities. This will contribute to the sustainability of the action. The mainstreaming shall be based on the identification and mitigation of environmental and climate risks as well as the potential inclusion of environment in the scope of the activities.

TAIEX will continue to offer a digital alternative to beneficiaries, when this is considered relevant and possible, to reduce its carbon footprint. When face-to-face activities are planned, the external service provider will be instructed to consider opting for eco-friendly suppliers and supplies, as well as using other means of reducing carbon footprint e.g. use of trains instead of planes, no printing, using tap water etc. More specifically, the external service provider will be instructed to comply with the Green Public Procurement principles understood as a process whereby public authorities seek to procure goods, services and works with a reduced environmental impact throughout their life cycle when compared to goods, services and works with the same primary function that would otherwise be procured.

Gender equality and empowerment of women and girls

As per the OECD Gender DAC codes identified in section 1.1, this action is labelled as G1. This implies that gender is not targeted directly as a principal objective, but TAIEX promotes the European public policy model and EU values including, inter alia good governance issues, promotion of human and fundamental rights, and the Gender Action Plan III in particular to its thematic area of "Addressing the challenges and harnessing the opportunities offered by the green transition and the digital transformation" and "promoting economic and social rights and empowering girls and women".

The promotion of gender equality is at the core of EU values, is a fundamental right and key principle not only of the Gender Action Plan III,¹ but also the European Pillar of Social Rights². Through a broad and

¹ Communication from the Commission to the European Parliament, The Council, The European Economic and Social Committee and the Committee of the Regions. A Union of Equality: Gender Equality Strategy 2020-2025. COM (2020) 152 final

²https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/economy-works-people/jobs-growth-and-investment/european-pillar-social-rights_en

robust normative frame for gender equality and women's empowerment (GEWE), the instrument encourages partners to attend gender transformative policies in all external action by building alliances to achieve SDG 5.

On the basis of the recommendations of a gender analysis performed in 2021, TAIEX will contribute to **improving gender mainstreaming by systematic review of relevant gender mainstreaming for approval of its actions**. Furthermore, gender issues remain high in TAIEX activities' agenda. TAIEX will continue to effectively promote equality, inclusion and combat discrimination as well as to take measures to achieve gender equal opportunities in all aspects of its activities.

Human Rights

TAIEX promotes the European public policy model which is human rights based. TAIEX builds the capacities of state actors, which are the duty-bearers of human rights. This can include for instance, judiciary and law enforcement authorities. The activities contribute to the capacity building of the beneficiary institutions by strengthening and facilitating the implementation of internationally agreed human rights, and taking into account the specific needs of each beneficiary and their progress.

Disability

As per OECD Disability DAC codes identified in section 1.1, this action is labelled as D1. This implies that disability is not a principal target although the organization of all TAIEX activities takes due regard to accessibility and the inclusion of participants and experts as needed. In addition, the content of the activities, when relevant for the partner countries, supports the duty bearer institutions by sharing good practices and knowledge in this area. The EU and its MS have extensive knowledge and experience in implementing the UN convention of the rights of persons with disabilities and the EU disability strategy, and are leading in promoting disability inclusive society TAIEX will continue to effectively promote equality, inclusion, and combat discrimination as well as to take measures to achieve equal opportunities and accessibility in all aspects of its activities.

Reduction of inequalities

Within country income inequality has been on the rise over the past decades, in particular in Sub-Saharan Africa and Latin America. By strengthening public sector capacity, TAIEX can contribute to better service delivery, particularly for more vulnerable groups.

Democracy

As TAIEX focuses on strengthening the public sector, it enhances democracy by increasing accountability and transparency of public sector institutions.

Conflict sensitivity, peace and resilience

TAIEX can be an added value in countries in conflict, by providing short-term solutions where long-term programmes are no longer possible. TAIEX can intervene in different dimensions of fragility, including societal, political, economic, environmental and security-related. In particular, TAIEX can help to build the resilience of the state in various areas.

Disaster Risk Reduction

TAIEX can support disaster risk reduction by sharing EU Member States public sector expertise in this area.

3.4 Risks and Lessons Learnt

Category	Risks	Likelihood (High/ Medium/ Low)	Impact (High/ Medium/ Low)	Mitigating measures

Financial	Risk 1 Oversubscription of TAIEX due to the flexibility of the instrument	High	High	Higher amount for financing decision than previous years to ensure continuation of support. New application form that aims to select the events most closely aligned with EU and partner country priorities, finding better synergies with other programmes that can complement TAIEX
Strategic	Risk 2 TAIEX applications are not targeting EU priorities	High	Medium	New application form that aims to select the events most closely aligned with EU and partner country priorities, finding better synergies with other programmes that can complement TAIEX Higher involvement of Commission thematic and geo staff and EU Delegations Set-up of network of National Contact Points for TAIEX in the partner countries-
External environment	Risk 3 Experts in the existing TAIEX database do not match the required needs for assistance and/or have limited availability	Low	Medium	Outreach activities that target the National Contact Points for TAIEX in each EU Member State or institution of origin.
Planning, process and systems	Risk 4 Possible overlap and complementarity with other support programmes	Low	Medium	Appropriate coordination at country and headquarters level, line DGs, among EU Delegations, EU MS in country and actors involved.
External environment	Limited engagement in favour of gender mainstreaming and the empowerment of women, a human rights-based approach, and people living with disabilities by the targeted institutions and non-state actors			The action will provide adequate resources to work with partner institutions on the importance of integrating gender equality, a human rights-based approach, and the rights of persons with disabilities
Lessons Learnt:				

Operating since 1996, TAIEX has a proven track-record in mobilising Member States expertise. Continuous efforts are made to adapt and improve the way TAIEX assistance is implemented. Improvements in the medium-term shall include, but not be limited to, increasing an environmentally friendly approach to TAIEX assistance, wherever appropriate, and improved knowledge management.

In countries where the demand is generally low, measures can be envisaged, together with respective TAIEX National Contact Points and EU Delegations, to increase awareness of potential beneficiary institutions about the possibilities that TAIEX can offer.

In countries where the demand is particularly high, efforts have been done to work with the EU Delegations and NCPs to select the proposals that are most likely to have an impact. Those with more anticipated impact will get priority in terms of implementation. Synergies will be sought in organising multi-country events for duty-bearers with similar interest, often through opening digital channels for participation.

Efforts have already been done and will continue to seek synergies with other programmes with the aim to focus TAIEX on those cases where the instrument is most appropriate, and the impact is greatest.

The network of NCPs will be systematically enhanced throughout the programme.

The latest evaluation of the TAIEX instrument was published in May 2022 and covered the implementation period of 2015-2020. Among the key conclusions, TAIEX has proven to be an effective, gap-filling tool for supporting reforms and strengthening administrative capacities in partner countries, which is increasing its geographical scope benefitting more than 100 countries and thus expanding the EU's external relations toolbox across the world

After the COVID-19 pandemic outbreak, TAIEX instrument adapted to the new reality and enforced new working methods and digital solutions which continue to enrich the activities offered even after the pandemic restrictions had been lifted. In this regard, the successful experience of the digital leap in the context of COVID-19 pandemic and its effects on travel and face-to-face events has confirmed the ability of TAIEX to offer assistance via digital means. This digital leap will contribute to a more effective assistance complementing in-person activities with other digital means (such as online and hybrid activities). It results in a wider accessibility to the activities implemented and greening the instrument while maintaining the same high-quality features

3.5 The Intervention Logic

The underlying intervention logic for this action is as follows:

The fundamental rationale behind this action is based on the belief that disseminating European public sector expertise through TAIEX will enhance partner countries' capacity in institutional administration. This, in turn, enables them to pursue meaningful public policy reforms inspired by the European public policy model, leading to an improvement in public policy and regulation within partner countries. TAIEX events are instrumental in implementing EU policy priorities and advancing EU values. They seamlessly complement and align with ongoing country activities in partner nations, ensuring that their capacity-building element works synergistically with other implementation tools.

A logical framework matrix is not applicable given TAIEX' demand driven nature.

3.6 Logical Framework Matrix

A logical framework matrix is not applicable because TAIEX provides technical assistance on demand.

4. IMPLEMENTATION ARRANGEMENTS

4.1. Financing Agreement

In order to implement this action, it is not envisaged to conclude a financing agreement with the partner country.

4.2. Indicative Implementation Period

The indicative operational implementation period of this action, during which the activities described in section 3 will be carried out and the corresponding contracts and agreements implemented, is 60 months from the date of the adoption by the Commission of this Financing Decision.

Extensions of the implementation period may be agreed by the Commission's responsible authorising officer in duly justified cases.

4.3. Implementation Modalities

The Commission will ensure that the EU appropriate rules and procedures for providing financing to third parties are respected, including review procedures, where appropriate, and compliance of the action with EU restrictive measures.³

4.3.1. Direct Management (Procurement)

The TAIEX instrument will be implemented in direct management by the European Commission, through co-delegation with Directorate-General for Neighbourhood and Enlargement Negotiations which is the authorising officer.

The support services to roll out the instrument and provide all goods and services necessary are procured, while public officials appointed to deliver assistance are selected by the Commission and awarded a financial compensation for participation.

4.4. Scope of geographical eligibility for procurement and grants

The geographical eligibility in terms of place of establishment for participating in procurement and grant award procedures and in terms of origin of supplies purchased as established in the basic act and set out in the relevant contractual documents shall apply.

The Commission's authorising officer responsible may extend the geographical eligibility on the basis of urgency or of unavailability of services in the markets of the countries or territories concerned, or in other duly substantiated cases where application of the eligibility rules would make the realisation of this action impossible or exceedingly difficult (Article 28(10) NDICI-Global Europe Regulation).

Regarding procurements for TAIEX instrument (service contracts for the IT platform and for the logistics of the activities), the geographical eligibility is global.

TAIEX activities involve EU Member States public experts and potentially relevant regional, local experts if deemed necessary: they receive a financial compensation, a grant, for their participation to TAIEX activities. In this regard, the geographical eligibility for this compensation is the EU Member States. In exceptional cases, experts from relevant partner countries can be invited as well. They are compensated as EU experts. Private experts, when participating, are subject to compensation and selection based on procurement rules.

³ www.sanctionsmap.eu. Please note that the sanctions map is an IT tool for identifying the sanctions regimes. The source of the sanctions stems from legal acts published in the Official Journal (OJ). In case of discrepancy between the published legal acts and the updates on the website it is the OJ version that prevails.

4.5. Indicative Budget

Indicative Budget components	EU contribution (amount in EUR) 2024	EU contribution (Amount in EUR) 2025	EU contribution (amount in EUR) 2026
Procurement (direct management)	3 755 995	2 444 005	2 000 000
Evaluation – cf. section 5.2 Audit – cf. section 5.3	May be covered by another Decision	May be covered by another Decision	May be covered by another Decision
Totals	3 755 995	2 444 005	2 000 000

4.6. Organisational Set-up and Responsibilities

The European Commission is the contracting authority. Directorate-General for Neighbourhood and Enlargement Negotiations (DG NEAR) is responsible for TAIEX implementation – and responsible for both the analysis and assessment of requests and for the content of TAIEX short and medium-term assistance, including the identification of experts from EU Member States' public administrations and other institutions willing to engage in this type of peer-to-peer assistance. Throughout the implementation of TAIEX assistance excellent cooperation and coordination with all actors involved is key to the success of the instrument.

Requests for TAIEX actions are generated by beneficiaries and/or driven by the EU involved stakeholders. Incoming requests are reviewed on a continuous basis and decided upon following consultation with relevant European Commission services and the European External Action Service, including EU Delegations, in order to ensure complementarity with national programmes and other technical assistance instruments. Relevance and potential impact of action is assessed at this stage.

Upon confirmation of the incoming requests, the Commission is in charge of identifying the relevant public experts from EU Member States or other institutions (if relevant) to address the requests. This is done through the existing database of public experts of TAIEX. When the pool of registered experts is not providing the appropriate expertise, the established network of National Contact Point (NCPs) in the EU Member States is mobilised to identify the appropriate experts.

For the provision of logistical means needed for TAIEX events, the European Commission concludes a contract with an external service provider. This service provider organises all logistical arrangements - including travel, accommodation, conferences, and meeting organisations – and also related payment services that are required for the implementation of the action. This implementation approach has proved to be efficient and effective. It allows for a swift and effective response to incoming requests and evolving needs, whilst ensuring financial transparency, accountability, and efficient management.

Commission services closely cooperate in the promotion and implementation of TAIEX to ensure it promotes EU's policies and priorities.

5. PERFORMANCE MEASUREMENT

5.1. Monitoring and Reporting

The day-to-day technical and financial monitoring of the implementation of this action will be a continuous process, and part of the implementing partner's responsibilities. To this aim, the implementing partner shall establish a permanent internal, technical and financial monitoring system for the action and elaborate regular progress reports (not less than annual) and final reports. Every report shall provide an accurate account of implementation of the action, difficulties encountered, changes introduced, as well as the degree of achievement of its results (Outputs and direct Outcomes) as measured by corresponding indicators, using as reference the log frame matrix (for project modality) and the partner's strategy, policy, or reform action plan list (for budget support).

The Commission may undertake additional project monitoring visits both through its own staff and through independent consultants recruited directly by the Commission for independent monitoring reviews (or recruited by the responsible agent contracted by the Commission for implementing such reviews).

Following each event participants and experts receive an automatic feedback questionnaire to assess their overall impression of the assistance provided and of the logistics of the event. Furthermore, following expert missions, EU Member State officials are requested to submit short mission reports summarising the objective of their intervention and formulate recommendations. The beneficiary institutions also receive an evaluation form six months after the end of the TAIEX activity to comment on the impact of the intervention.

Under direct management of this action, the collection of data and analysis is carried out by the European Commission. To this effect, the necessary technical arrangements are set in place to collect and aggregate data from participants of the beneficiary entities and the experts of the EU Member States as described above.

On an annual basis, the Directorate-General for Neighbourhood and Enlargement Negotiations is publishing a global annual report that is made public through its website and shares flash reports with statistics on a bi-annual basis to the network of National Contact Points for TAIEX in EU Member States.

All monitoring and reporting shall assess how the action is considering the principle of gender equality, human rights-based approach, and rights of persons with disabilities including inclusion and diversity. Indicators shall be disaggregated at least by sex.

5.2. Evaluation

Having regard to the nature of the action, an evaluation will not be carried out for this action or its components.

However, the European Commission may, during implementation, decide to undertake such an evaluation for duly justified reasons either on its own decision or on the initiative of a partner. The evaluations should be carried out following the guidelines of the Directorate-General for Neighbourhood and Enlargement Negotiations on linking planning/programming, monitoring and evaluation. The evaluation reports may be shared with the partners and other key stakeholders following the best practice of evaluation dissemination. The implementing partner and the Commission shall analyse the conclusions and recommendations of the evaluations and, where appropriate, in agreement with the partner country, jointly decide on the follow-up actions to be taken and any adjustments necessary, including, if indicated, the reorientation of the project. The evaluation will assess to what extent the action is taking into account the human rights-based approach as well as how it contributes to gender equality and women's empowerment, whenever it is deemed relevant with regards to the nature and topics covered by the evaluated action. Expertise on human rights and gender equality will be ensured in the evaluation teams.

In addition, all evaluations shall assess to what extent the action is taking into account the human rights-based approach as well as how it contributes to gender equality and women's empowerment and disability inclusion. Expertise on human rights, disability and gender equality will be ensured in the evaluation teams.

When appropriate, the financing of the evaluation shall be covered by another measure constituting a Financing Decision.

Since its creation in 1996, the TAIEX instrument was evaluated in 2007, 2015 and in 2021. It will continue to be evaluated in the similar pace in the future, with a greater focus given to gender equality and inclusion related data.

5.3. Audit and Verifications

Without prejudice to the obligations applicable to contracts concluded for the implementation of this action, the Commission may, on the basis of a risk assessment, contract independent audit or verification assignments for one or several contracts or agreements.

6. STRATEGIC COMMUNICATION AND PUBLIC DIPLOMACY

All entities implementing EU funded external actions have the contractual obligation to inform the relevant audiences of the Union's support for their work by displaying the EU emblem and a short funding statement as appropriate on all communication materials related to the actions concerned. To that end they must comply with the instructions given in the 2022 guidance document [*Communicating and raising EU visibility: Guidance for external actions*](#) (or any successor document).

This obligation will apply equally, regardless of whether the actions concerned are implemented by the Commission, partner countries, service providers, grant beneficiaries or entrusted or delegated entities such as UN agencies, international financial institutions and agencies of EU member states. In each case, a reference to the relevant contractual obligations must be included in the respective financing agreement, procurement and grant contracts, and delegation agreements.

For the purpose of enhancing the visibility of the EU and its contribution to this action, the Commission may sign or enter into joint declarations or statements, as part of its prerogative of budget implementation and to safeguard the financial interests of the Union. Visibility and communication measures should also promote transparency and accountability on the use of funds. Effectiveness of communication activities on awareness about the action and its objectives as well as on EU funding of the action should be measured.

Implementing partners shall keep the Commission and concerned EU Delegation/Office fully informed of the planning and implementation of specific outreach and visibility activities before work starts. Implementing partners will ensure adequate visibility of EU financing and will report on visibility and outreach actions as well as the results of the overall action to the relevant monitoring committees.

The European Commission's Directorate-General for Neighbourhood and Enlargement Negotiations will ensure the visibility of TAIEX INTPA in communications related to TAIEX events where relevant.

Appendix 1 REPORTING IN OPSYS

A Primary Intervention (project/programme) is a coherent set of activities and results structured in a logical framework aiming at delivering development change or progress. Identifying the level of the primary intervention will allow for:

Articulating Actions or Contracts according to an expected chain of results and therefore allowing them to ensure efficient monitoring and reporting of performance;

Differentiating these Actions or Contracts from those that do not produce direct reportable development results, defined as support entities (i.e. audits, evaluations);

Having a complete and exhaustive mapping of all results-bearing Actions and Contracts.

Primary Interventions are identified during the design of each action by the responsible service (Delegation or Headquarters operational Unit).

The level of the Primary Intervention chosen can be modified (directly in OPSYS) and the modification does not constitute an amendment of the action document.

The intervention level for the present Action identifies as (tick one of the 4 following options);

Action level (i.e. Budget Support, blending)		
<input checked="" type="checkbox"/>	Single action	Present action: all contracts in the present action