

### Annex 3

## Master Plan/Action Plan/Road Map concept template

The aim of the template is to gather information about the new Master Plan/Action Plan/Road Map concepts of each TSG to be further developed and implemented. The template and the evaluation list ensure the Audit trail. The template should be filled out by the stakeholder from the Adriatic-Ionian Region. The evaluation list must be filled out by TSG member (evaluator) in order to come up with their decision.

If necessary, a support for preparation can be provided within the scope of EUSAIR governance support projects by engaging external expert/s. In that case it is necessary to fill out Annex 5 External expert engagement form prior to the submission of this template.

### 1.1 Template for the development of the Master Plan/Action Plan/Road Map *(filled in by applicant)*

<b>Strategic document title</b>	
<b>Acronym</b>	<i>If applicable in CAPITAL LETTERS</i>
<b>Strategic document type</b>	<i>Please select:</i> <input type="checkbox"/> <i>Master plan</i> <input type="checkbox"/> <i>Action plan</i> <input type="checkbox"/> <i>Road Map</i>
<b>ID number</b>	<i>Implementation format code – Pillar abbreviation – MM/YYYY - ACRONYM (if applicable)</i>  <i>e.g. SD-RP-P2E-07/2025-ENGY</i>  <i>Depending on the implementation format selected please follow the instruction for the ID number description.</i>  <u><i>Implementation format codes:</i></u> <i>SD-AP – Strategic document – Action plan</i> <i>SD-MP – Strategic document – Master plan</i> <i>SD-RM – Strategic document – Road map</i>  <u><i>Pillar abbreviations:</i></u> <i>Pillar 1 – P1</i> <i>Pillar 2 on Energy – P2E</i> <i>Pillar 2 on Transport – P2T</i> <i>Pillar 3 – P3</i> <i>Pillar 4 – P4</i> <i>Pillar 5 – P5</i>
<b>Origin of the initiative</b>	<i>Please list the name and the contact of:</i>  <ol style="list-style-type: none"> <li><i>1. the person(s) (TSG member, associate, stakeholder etc.)/organization(s) who suggested the idea</i></li> <li><i>2. or published it on the Stakeholder platform (if applicable)</i></li> </ol>
<b>Please indicate at which TSG meeting the strategic document was</b>	

SP4EUSAIR

<b>presented and/or discussed (if applicable)</b>	
<b>Rationale (background information)</b>	<i>Please describe the challenges and well-substantiated needs expressed by countries, regions and stakeholders or the European Commission services that strategic document addresses (up to 4000 characters)</i>
<b>Compliance with the Guiding Principles/Priorities of the respective Pillar</b>	<i>Describe the compliance of the suggested concept contributes with the Guiding Principles/Priorities and flagships of the respective Pillar (up to 2000 characters)</i>
<b>Related EUSAIR Action Plan topic(s) and action(s) compliance</b>	<i>Please indicate to which topic and action within EUSAIR Action Plan does the strategic document contribute to and shortly describe (up to 2000 characters)</i>
<b>Relevant framework</b>	<i>Describe the relevant legislative and regulatory framework that the concept is built upon. Describe added value of the document concerning the existing initiatives, strategies, networks etc. (up to 4000 characters)</i>
<b>General objective (1)</b>	<i>General objective should be broad and describe the high-level vision or mission of the strategic document while taking into account overarching goals relevant to the macroregion.</i>
<b>Specific objectives (up to 5)</b>	<i>Please note that the objectives should specific, measurable, achievable and relevant. If applicable, a time-bound component should also be included.</i>
<b>List all the key components and measures that can contribute to the achievement of objectives (at least 10)</b>	<p><i>Depending on the type of the document, key components can include:</i></p> <ul style="list-style-type: none"> <li>- for Master plans: strategic directions, thematic clusters, long-term measures, future trends,</li> <li>- for Action plans: set of prioritized actions, timelines, responsibilities, interventions,</li> <li>- for Road maps: phased pathway, enabling conditions, milestones/activities.</li> </ul> <p><i>Please note that the described activities/interventions/measures are broad enough that can be further translated into other implementation formats such as specific strategic project fiches, and/or knowledge and support formats and thus contribute to the strategic document implementation. Pay attention to cross-cutting aspects (e.g. digital transition, R&amp;I, capacity building, climate change, inclusivity, etc.) where applicable.</i></p> <p><i>If you have suggestions for concrete implementation formats that can be developed to achieve set objectives. Please list them using the following:</i></p> <p><u><i>Implementation format codes:</i></u>  <i>SP – Strategic project fiche</i>  <i>KS-S – Knowledge and support formats – Studies</i>  <i>KS-A – Knowledge and support formats – Action</i>  <i>KS-OF – Knowledge and support formats – Other formats</i></p>
<b>Stakeholders' involvement and relevance</b>	<i>Please list relevant groups of key stakeholders that can contribute to the development and implementation of strategic document objectives (e.g. different sectors, public administration, research institution, business sector, NGOs, other). Describe their roles and proposed coordination/implementation mechanisms if applicable (up to 3000 characters)</i>
<b>Expected results/outcomes (at least 5)</b>	<i>List main expected results (policy, social, economic, environmental). Please note they should be realistic and credible.</i>
<b>Macroregional (transnational) impact</b>	<i>Demonstrate a transnational, if not macroregional impact (up to 4000 characters)</i>

<b>Monitoring and follow-up</b>	<i>Describe tools and methods for monitoring implementation progress and suggestions for follow-up, revision cycles or institutional ownership. (up to 2000 characters)</i>
<b>Additional Information</b>	<i>Please add any other information you consider relevant</i>

The flagship initiative concept to be further developed should reach the threshold of at least 68 points out of maximum 90 (**75% threshold**)!

*Filled in Annex 3 should be submitted via e-mail to the one of the following addresses, depending on the topic addressed:*

- TSG1:
- TSG2:
- TSG3:
- TSG4:
- TSG5:

### 1.2 Evaluation list *(filled in by TSG member)*

<b>Evaluation criteria</b>	<b>Guiding questions</b>	<b>Scoring guidance</b>	<b>Score:</b>	<b>Comments:</b>
<b>Strategic relevance and rationale</b>	<i>Does the document address clear macroregional or Pillar-level challenges? Are needs well justified and based on evidence or stakeholder input? Is it clear why this type of strategic document is needed?</i>	<b>1-3:</b> Vague or unsubstantiated <b>4-6:</b> Moderate with some relevance <b>7-8:</b> Clear, with stakeholder/policy relevance <b>9-10:</b> Strong and well-substantiated		
<b>Compliance with the Guiding Principles/ Priorities of the respective Pillar</b>	<i>Is the document aligned with the Guiding Principles and flagship initiatives of the relevant Pillar(s)? Does it clearly reflect strategic Pillar direction?</i>	<b>Yes</b> = 10 <b>Partially</b> = 5 <b>No</b> = 0		
<b>Alignment with EUSAIR Action Plan (topics/action)</b>	<i>Does the document contribute to one or more topics/actions in the EUSAIR Action Plan? Is the connection clearly explained?</i>	<b>Yes</b> = 10 <b>Partially</b> = 5 <b>No</b> = 0		

SP4EUSAIR

<b>Evaluation criteria</b>	<b>Guiding questions</b>	<b>Scoring guidance</b>	<b>Score:</b>	<b>Comments:</b>
<b>Maturity, policy coherence, and added value</b>	<i>Is the document grounded in relevant legislative, regulatory, or strategic frameworks (EU, national, regional)? Does it build upon or complement existing initiatives, strategies, or networks? Does it add new value or address clear gaps?</i>	<p><b>1-3:</b> No or very weak link to existing frameworks; unclear added value</p> <p><b>4-6:</b> Some relevant references, but unclear complementarity or added value</p> <p><b>7-8:</b> Well grounded in relevant frameworks; some added value demonstrated</p> <p><b>9-10:</b> Strong policy coherence and clearly defined added value in context of existing initiatives</p>		
<b>Realistic and credible objectives</b>	<i>Are the general and specific objectives clearly defined? Are they measurable, actionable, and aligned with macroregional goals? Do they fit the purpose of the document type (Master Plan, Action Plan, or Road Map)?</i>	<p><b>1-3:</b> Vague/unrealistic</p> <p><b>4-6:</b> Partially clear or not feasible</p> <p><b>7-8:</b> Mostly clear and relevant</p> <p><b>9-10:</b> Strong, structured, well-aligned</p>		
<b>Macroregional (transnational) impact</b>	<i>Will the strategic document support cooperation across multiple countries? Does it propose a macroregional framework or harmonised actions? Is the expected impact well described?</i>	<p><b>1-3:</b> Local/limited scope</p> <p><b>4-6:</b> Some cross-border scope</p> <p><b>7-8:</b> Solid transnational cooperation</p> <p><b>9-10:</b> Strong macroregional relevance</p>		
<b>Feasibility and clarity of proposed measures/ activities/ interventions/ components</b>	<i>Are measures/ interventions logical, feasible, and clearly linked to objectives? Are cross-cutting aspects (e.g. digital, climate, capacity building) included where applicable? Are suggestions for implementation</i>	<p><b>1-3:</b> Unclear or poorly linked, no further implementation formats suggested</p> <p><b>4-6:</b> Listed but weak or missing cross-cutting value and clear connection to implementation formats</p>		

SP4EUSAIR

<b>Evaluation criteria</b>	<b>Guiding questions</b>	<b>Scoring guidance</b>	<b>Score:</b>	<b>Comments:</b>
	<p><i>formats (e.g. project fiches, studies) included and realistic?</i></p>	<p><b>7–8:</b> Clear and relevant, some examples of further implementation formats development are given  <b>9–10:</b> Strong alignment and cross-cutting integration, for each propose measure/intervention is given example of possible implementation format development</p>		
<p><b>Expected results and outcomes</b></p>	<p><i>Are they clearly formulated and aligned with the document's objectives? Do they reflect relevant dimensions (e.g. policy, social, economic, environmental)? Are they realistic, credible, and appropriate for the type of strategic document?</i></p>	<p><b>1–3:</b> Vague or missing  <b>4–6:</b> Listed but general or weakly linked to objectives  <b>7–8:</b> Mostly clear, relevant, and reflect multiple dimensions  <b>9–10:</b> Clear, credible, balanced and aligned with objectives and macroregional impact</p>		
<p><b>Monitoring and follow-up</b></p>	<p><i>Does the document include tools or methods for tracking implementation progress? Are indicators, evaluation approaches, or follow-up mechanisms proposed? Is there a plan for institutional ownership or revision cycles?</i></p>	<p><b>1–3:</b> Missing or vague monitoring plan; no ownership or review logic  <b>4–6:</b> Basic mention of indicators or follow-up but lacks clarity  <b>7–8:</b> Structured and feasible monitoring logic; some indication of ownership  <b>9–10:</b> Comprehensive and realistic monitoring and revision framework with defined institutional role(s)</p>		
<b>FINAL SCORE</b>				

SP4EUSAIR

Evaluation criteria	Guiding questions	Scoring guidance	Score:	Comments:
General comment of the Evaluator (TSG member)				

Evaluation results:

Final score: \_\_\_\_\_/90

Threshold reached (≥ 68 points):  Yes  No

Next Steps:

- **If YES** → The strategic document concept will be recommended for further development and consideration for integration into implementation planning and shared with relevant EUSAIR governance support project partners. The applicant may be contacted to refine the concept and suggest further implementation formats development (e.g., project fiche, study, actions).
  - *Optional follow up actions by Evaluator (TSG member)*
    - Assign TSG member(s) to support concept refinement:  
\_\_\_\_\_
    - Recommend discussion at next TSG meeting:  Yes  No
- **If NO** → The concept does not currently meet the threshold. Feedback should be provided to the applicant with recommendations for improvement. Resubmission may be considered if substantial adjustments are made.
  - **Recommendations for improvement:**