



NALAS Third Summer School on **Local Governance and Intergovernmental Fiscal Relations** 2016



10-15 July 2016
Lake Ohrid, Macedonia

Welcome to Ohrid!

Welcome to the NALAS Third Summer School on Urban Governance and Intergovernmental Fiscal Relations!

You will spend a week at the beautiful Ohrid Lake for an intensive learning experience in Multiannual and Investment Budgeting at Local Level, with a focus on the analytical tool developed by the World Bank, the Municipal Finance Self-Assessment.

We hope you will have a memorable stay in Ohrid where we have created an exciting environment for learning and exchange including renowned speakers, small-group and incredible nature and cultural heritage.

Overview:

Dates: **10-15 July 2016**

Location: **Ohrid** - UNESCO protected city, cultural and touristic centre of the Republic of Macedonia
www.ohrid.com.mk/index.asp

Accommodation: Beautiful beachside **hotel Inex Gorica**
Address: Naum Ohridski 5-7, Ohrid, Tel: +389 46 277 520
at just 30 minutes walk to Ohrid Old Town
www.inexgorica.com.mk/index.php/en/

Certificates: ***All participants will be awarded Certificates of Participation***



Questions or Assistance needed?

Find our Program Officer *Natasha Ilijeva Acevska* - (0038971823729) or
NALAS Office Manager *Katerina Stojanovic Aleksoska* (0038970670284)
and they will be able to assist you.



About the NALAS Summer School

NALAS Summer School is an event created to deepen the analytical skills of municipal finance experts and stakeholders from South East Europe, especially the members of the NALAS Task Force on Fiscal Decentralisation. It is designed to facilitate the exchange of information between NALAS members about pressing policy issues and deepen the theoretical and practical understanding of how these issues are addressed elsewhere.

Summer School Editions 2014 & 2015

NALAS' first Summer School was held in July 2014. The three day sessions discussed topics of fiscal equalization and were attended by 25 participants from 11 different NALAS members. It teaches participants how to enter, maintain and analyze municipal revenue and expenditure data from the point of view of disparities between groups and types of local governments. Participants worked on data from their own associations and learned how to use pivot tables to organize municipalities into different groups and to efficiently analyze their per capita revenues and expenditures. The instructors for the first two days of the course were Tony Levitas and Jan Herczynski. The third day engaged the political leadership of the NALAS members and focused on the problems that fiscal equalization poses for municipal associations. This discussion was led by Prof. Bernarhd Spahn.

The second edition of the Summer School took place in August 2015 with the main focus on Property Tax Reforms. The agenda was a proper blend of technical sessions on property tax policy and administration issues provided by the international expert; country-specific sessions (on Macedonia, Kosovo, and Bulgaria), and mapping sessions (facilitated by the international expert) where participants from associations from 10 SEE countries could provide input on their property tax systems and/or elaborate on the templates that were to be submitted prior to the commencement of the summer school. The main trainer of the second edition of the Summer School was Mr. Riel Franzsen, who occupies the South African Research Chair in Tax Policy and Governance in the Faculty of Economic and Management Sciences at the University of Pretoria.

INSTRUCTORS | *The 2016 Summer School brings an excellent team of trainers:*



Dr. Mihaly Kopanyi

Municipal Finance Advisor, World Bank retiree

Dr. Mihaly Kopanyi is a Municipal Finance Advisor, World Bank retiree with 23 years of Bank carrier. He was the chair of the Municipal Finance Thematic Group for over a decade before retiring in 2011. He worked in about 30 countries in Europe, Middle-East, Africa, and south Asia, including 3 year field assignment in Pakistan. His areas of expertise include municipal finance, infrastructure project financing, financial markets and intermediaries (municipal funds and specialized banks). He is actively advising Bank teams in structuring urban projects, prominent expert on own-revenue generation and intergovernmental finance reforms, and financial sustainability. He has prepared dozens of analytic papers for WB and London School of Economics and over a dozen of books on the said areas. Recent works include the Municipal Finance Handbook, published in three languages, in Turkey: Financing Municipalities in Urbanization Review (2014), Fiscal Instruments in Reducing Socio-economic disparities (2016), and Municipal Bond Market options (2016). Rwanda: Investment financing; Property tax reform, and Urban Fund (2014-16), Uganda: Kampala Own-revenue Reform (2015). He has 18 years of academic carrier prior the Bank; he is key specialist in Bank trainings, including the Municipal Finance e-Learning program, he coauthored and tutoring in WBI. Mihaly has a PhD on economics, and another one on Logistics.

**Gjorgji Josifov***Assistant Vice President/Analyst, Sub-Sovereign Group*

Gjorgji Josifov joined Moody's in 2011 as Assistant Vice President/Analyst within the Sub-Sovereign Group, covering a comprehensive portfolio of regional and local governments in various countries of Central and South-Eastern Europe including Bosnia and Herzegovina, Croatia, Czech Republic, Estonia, Greece, Hungary, Latvia, Poland, Romania, Serbia and Turkey.

Prior to joining Moody's, Gjorgji served as a Chief of Party of the USAID-funded Macedonia Local Government Project (2007-2011). Along with the Chief of Party position he managed the Capital Budgeting and Municipal Credit project component. During 2004-2007, he spent three years as a Municipal Finance Specialist with USAID-funded Make Decentralization Work project in Macedonia.

He has more than 15 years of experience in public budgeting and financial management, municipal capital investment finance, municipal debt regulation and municipal credit markets.

Gjorgji is a PhD candidate in Economics, and holds a Master Degree in European Integration and Regionalism from Karl Franzens University of Graz. He earned a BS in economics from University of "Ss. Cyril and Methodius, Skopje, Macedonia.

**Mehmet Onur Partal***Expert, Istanbul Development Agency*

Mehmet Onur Partal is an expert in Istanbul Development Agency. He has been responsible for defining the development priorities of Istanbul, conducting co-financing processes of projects, and attracting FDI into the city. He was one of the main contributors to the books "Istanbul Fact Sheet" and "Investment in Istanbul and the Barriers Encountered by Investors" released by Istanbul Development Agency; "Local Government Borrowing Practices in NALAS Countries" by NALAS. Besides his position in the Agency, he is a columnist in Marmara Life – Local Government Magazine, sharing articles on the financial issues of local governments in South-East Europe.

Regarding his educational background, Partal is briefly an economist. After graduating from Kadir Has University with the top GPA in Business Administration Department, he was awarded with the world-renowned prestigious Fulbright scholarship for a master's degree at the Economics Department of Syracuse University. He is currently enrolled in a PhD program in Economics at Yildiz Technical University, Istanbul. He has several scientific articles on the topics of public finance and development economics.

Mr. Partal is fond of not only watching but also acting in soccer, basketball, table tennis, chess and theater.



Marjan Nikolov
Global PPP specialist

Marjan Nikolov is a Global PPP specialist with a PhD in measuring efficiency in decentralization from the University of Ljubljana. He worked in around 15 countries in Europe, Middle-East and Africa. His area of expertise includes municipal finance and fiscal decentralization, public finance management, PPP feasibility studies, fiscal transparency and monitoring and cost benefit analyses. He has prepared, designed and implemented trainings, policy papers and research papers related to PFM and decentralization. Recent work includes Review of Sub-Projects financed under the Macedonia World Bank's Municipal Service Improvement Project (MSIP), project appraisal documents preparation for the World Bank's MSIP, cost benefit analyses of GIS implementation in Nairobi's counties, training for Iraqi and Kurdish MPs on PFM and budgeting, Training for Jordanian Ministry of finance and GBD on mid-year review and citizen budget preparation, Training for Tunisian association of municipalities on budgeting, training for NALAS association on World Bank's MFSA tool. Marjan used to work in the Economic institute of Iceland and also used to teach more than 10 years at private faculties in Macedonia topics as financing regional and local development, statistics, public finance at local level and mathematics for economists.



Ljiljana Brdarevic
Former Deputy Finance Secretary for the City of Belgrade

Ljiljana Brdarevic is the former Deputy Finance Secretary for the City of Belgrade and founder of the public sector lending activities at Raiffeisen Bank in Serbia. Previously, she had a distinguished career of 16 years in commercial banking. Since 2005 she has been performing challenging assignments funded by the international donors (WB, IFC, USAID, EU, EBRD, KfW) in the SEE countries. Her areas of expertise include fiscal and banking management, municipal credit market development, capital project financing and public-private partnership establishment. During work for USAID and EU funded projects in Serbia, she helped local governments to build up their capacities in improving financial, budget and debt management, and in enhancing its services through project development and capital finance. In addition, she took the lead in signing of the first international credit rating of three Serbian cities by the Moody's Investors Service as well as in preparing the first municipal bond issuance by the City of Novi Sad. She has wrote a number of manuals for the local governments, such as: Capital investment planning; Project development and capital finance; Developing local infrastructure through PPP; Local government access the capital market and financing by issuing bond. She holds a Master Degree in monetary, fiscal and banking management from the University of Belgrade. Ms. Brdarević enjoys skiing, swimming, dancing and long walks.

AGENDA

SUNDAY - 10 JULY

Arrivals and accommodation at hotel Inex Gorica in Ohrid www.hotelinexgorica.com.mk/index.php/en

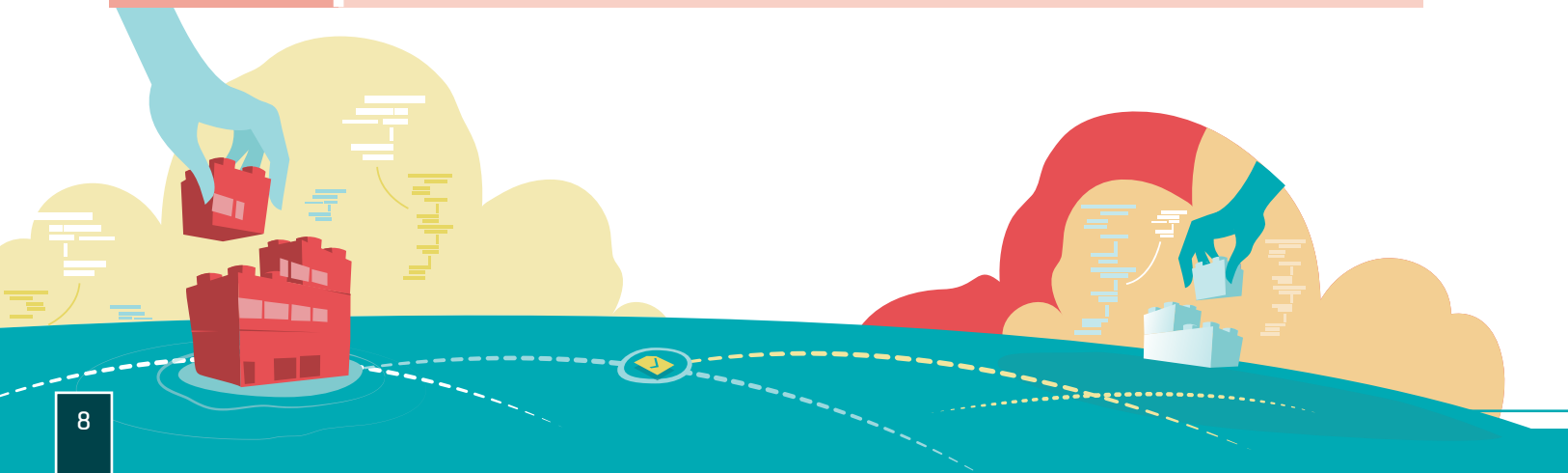
19:30 – 22:00 Welcome cocktail at the hotel terrace, Introductions

MONDAY – 11 JULY

09:00 – 10:00	Opening session	Kelmend Zajazi, NALAS Catherine F. Vitkovic, World Bank (tbc) KDZ representatives (tbc)
10:00 – 11:00	How can municipalities stimulate local economy? The need for stability and predictability of the national and local public policies	Trainers: Gjorgji Josifov, Mehmet Onur Partal
11:00 – 11:30	Coffee Break	
11:30 – 13:00	Alignment of local strategies, budgets and municipal investments and prioritizing local investment needs with local sectoral policies	Trainers: Gjorgji Josifov, Mehmet Onur Partal
13:00 – 14:30	Lunch	
14:30 – 15:30	Establishing & maintaining the process of capital investment and funding	Trainers: Gjorgji Josifov, Mehmet Onur Partal
15:30 – 15:45	Coffee Break	
15:45 – 17:00	Introduction to Multiannual vs. Annual budgeting – focus on EU projects perspective;	Trainers: Gjorgji Josifov, Mehmet Onur Partal
18:00 – 23:00	Sightseeing Ohrid Lake and Dinner	

TUESDAY – 12 JULY

09:00 – 11:00	Methods and tools for revenue and expenditure forecasting for local budgets; increasing awareness in investment planning and funding	Trainers: Gjorgji Josifov, Mehmet Onur Partal
11:00 – 11:30	Coffee Break	
11:30 – 13:00	Case Studies from South East Europe (Zagreb and Istanbul)	Trainers: Gjorgji Josifov, Mehmet Onur Partal
13:00 – 14:30	Lunch	
14:30 – 15:45	Municipal Infrastructure Investments Contributing to Sustainable Economic Growth	
15:45 – 16:00	Coffee Break	
16:00 – 17:30	Case studies from Poland and Czech Republic	Trainers: Gjorgji Josifov, Mehmet Onur Partal
19:30 – 22:00	Dinner at the hotel restaurant	



WEDNESDAY – 13 JULY

09:00 – 10:30	Alternative Project Financing Methods for Local Governments	Trainers: Gjorgji Josifov, Mehmet Onur Partal
10:30 – 11:00	Coffee Break	
11:00 – 11:30	Municipal Finances Self-Assessment Analytical Tool for Support of Multiannual Budgeting and Investment as well as Performance Management	Trainer: Catherine F. Vitkovic, World Bank
11:30 – 13:00	Roundtable Discussion: MFSA & Participatory budgeting, transparency and accountability in budget preparation, execution and reporting	Moderator: Marjan Nikolov All participants
13:00 – 14:00	Lunch	
14:00 – 15:30	Interactive Session: The importance and the Know-How of the Generic Accounting Framework, Historical analysis, Ratio analysis the Action Plan of MFSA	Trainers: Marjan Nikolov Ljiljana Brdarevic MFSA pilot municipalities
15:30 – 15:45	Coffee Break	
15:45 – 17:00	My MFSA experience Presentations of MFSA pilot municipalities	
18:00 – 20:00	Visit to St Naum Monastery and springs of the river Crn Drim	
20:00	Dinner at the hotel restaurant	

THURSDAY – 14 JULY

09:00 – 11:00	Interactive Session: MFSA Indicators as a Support to the Decision Making Process at Local Level Based on pre-defined indicators Pilot municipalities present the situation in their LG, and LGA representatives and TF members translate it into national policy arguments, Experts comment the findings	Moderators: Ms Ljiljana Brdarevic, Mr Mihaly Kopanyi
11:00 – 11:30	Coffee Break	
11:30 – 13:00	The stories of the data: Data presentation and visualization for various audiences: municipal employees, local decision-makers, citizens, LGAs, central level agents, international financing institutions and donors	Trainer: Mr Mihaly Kopanyi
13:00 – 14:30	Lunch	
14:30 – 16:00	Expanding the FD Monitoring in SEE and Dashboard	Moderator: Natasha Ilijeva Acevska
16:00 – 17:00	Wrap Up, Feedback	
20:00 – 23:00	Farewell Cocktail and Awarding Certificates of Participation	

FRIDAY – 15 JULY

09:00 – 12:00	Individual Consultations with the trainers
12:00	Lunch

Departures

About Ohrid and the Lake

Ohrid is one of the oldest human settlements in Europe and the lake itself is over three million years old. The city is first mentioned in Greek documents from 353 B.C.E., when it was known as Lychnidos (the city of light). In 879 C.E., it was renamed Ohrid. The town as we know it today was built mostly between the 7th and 19th centuries. During the Byzantine period, Ohrid became a significant cultural and economic center, serving as an episcopal center of the Orthodox Church and as the site of the first Slavic university run by St. Kliment and St. Naum at the end of the 9th century. In the 11th century, Ohrid was important point of the great Samuil empire, whose fortress still presides over the city today. Lake Ohrid is one of Europe's deepest and oldest lakes, preserving a unique aquatic ecosystem with more than 200 endemic species of worldwide importance. The importance of the lake was further emphasized when it was declared a World Heritage site by UNESCO in 1979. The east coast of the Lake where we are located is part of Galicica National Park and it is protected by UNESCO along with the lake for its natural values.





Varshavska 36A
1000 Skopje
Republic of Macedonia
Tel/Fax: +389 2 3090818
www.nalas.eu



We hope
you have a
**successful and joyful
summer experience
with NALAS!**