

## Terms of Reference (ToR)

### Provision of external service: Technical assistance for Sustainable Tourism Project (Interreg MED) - Working for the Italian, Croatian, IPA and Maltese Antennas: Transferring and Mainstreaming activities

*Sustainable Tourism Project - Ref: 7MED19\_3.1\_HP\_005*

*Co-financed by Interreg Med Programme 2014-2020 and European Regional Development Fund (ERDF)*

#### Background

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The Adriatic Ionian Euroregion (hereinafter referred as AIE) is an association for the promotion of trans-national and inter-regional cooperation between regions and local authorities of the Adriatic and Ionian basin. The AIE is implementing the European Territorial Cooperation project Sustainable Tourism, co-financed by Interreg MED Programme 2014-2020. The Interreg MED programme is a transnational European Cooperation Programme for the Mediterranean area. The Programme is co-financed by the ERDF (European Regional Development Fund).

#### Brief description of Sustainable Tourism project and its Sustainable Tourism Community

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The aim of Sustainable Tourism project is to support other projects financed by the MED Programme under the same priority for creating a cluster of initiatives of the sustainable tourism sector in MED area. The project is supporting the mainstreaming of the INTERREG MED modular and strategic projects results of axis 3.1 (sustainable tourism) by communication, transferring & community building, and capitalisation activities. The objective is to set up a general framework of collaboration to facilitate the creation of synergies among modular projects, to enhance its visibility and to support the institutional uptake of their outputs and results, mainly in the field of tourism policies and cohesion policies.

The project is built upon the results of the previous horizontal project (BleuTourMED\_C3) and it is managed by a sound partnership with capacity to reach the main stakeholders of the tourism sector gathering, at the same time, different expertise and profiles: sectoral European networks (NECSTouR), destination management organisations (DIBA, RDA Green Karst), Mediterranean networks (UNIMED and Adriatic Ionian Euroregion), Mediterranean research centre (Plan Bleu) and universities (Thessaly). The project will dedicate this mandate to the transferring of results and policies developed by the MED modular projects on sustainable tourism.

Website: <https://sustainable-tourism.interreg-med.eu>

In brief, Sustainable Tourism (ST) project gathers the Interreg MED “Sustainable Tourism Community” composed by a series of Modular Projects (MPs) and Strategic Projects. The project will have to ensure the transfer/mainstream of synthesised projects’ outcomes and their dissemination across and beyond the region. To know more about this community: <https://sustainable-tourism.interreg-med.eu/about-us/our-community/>

#### Context and Objective of the Terms of Reference

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Under the Sustainable Tourism project, following the approval of the Capitalisation and transferring plans, the AIE has taken responsibility to conduct capitalisation and transferring activities in its territory of competence and to develop the activities planned in the antenna action plans elaborated for the following geographical area: Italy, Croatia, IPA countries (Montenegro, BiH and Albania) and Malta.

The purposes are to:

1. generate a capitalisation responsive environment by mapping and engaging the strategic stakeholders related to thematic and/or institutional competences;
2. to mainstream the Community results by its incorporation into regional, national, MED and EU policies and regulatory frameworks.

The AIE purpose is also to promote sustainable tourism practices among its members, involving them in the project activities and promoting synergies with Mediterranean actors.

In particular, the service is necessary for the implementation of the activities entrusted to AIE under the project Sustainable Tourism and, in particular, of those falling within WP4 Transferring & Community building and WP5 Capitalising. The extra financial resources to implement part of these activities have become available since the partnership decide to redistribute the project budget between partners, giving to AIE new tasks and a corresponding higher resource allocation (budget modifications: decision taken by the project steering committee on 16/11/2020).

The scope of these Terms of Reference targets an external service provision of a specialist to support the AIE in performing the Tasks assigned in WP4 and WP5 described as Transferring and Capitalisation/Mainstreaming:

- TRANSFERRING: the activities related to the technical transfer of good practices of the modular projects of the community to other territories. These actions include as well as the monitoring of Modular projects assigned to AIE;
- CAPITALISATION and MAINSTREAMING: the activities favouring the political uptaking of good practices and their inclusion into the policy framework;

These activities must be implemented by AIE in the regions assigned as territorial Antenna (Italy, Malta, IPA countries, Croatia). The services will be accomplished through the execution of the tasks assigned to AIE by WP leaders and the contribution to the related deliverables, as described in the following paragraph.

### **Contracting entity**

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Adriatic Ionian Euroregion (AIE) - Jadransko Jonska Euroregija  
Headquarter and Registered Office: Flanatička 29, 52100, Pula, Croatia  
VAT/OIB: 87750913519

### **Proposed methods and activities**

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The main objective of the contract is to contribute to the goals of the Sustainable Tourism project, by subcontracting services that are necessary for the implementation of the tasks forming part of the activities that the AIE needs to carry out within the project.

The services will be accomplished through the execution of two main tasks composed by different activities. The results of the services are needed for feeding some deliverables of the project in which AIE is called to contribute to.

#### **Task 1 – Transferring & Community Building**

The task is linked to the activities foreseen in WP4 focused on the effective transferring of the Sustainable Tourism Community's most tangible and replicable outputs and results in order to achieve territorial ownership of the Community's achievements in the Mediterranean area.

The task includes monitoring activities of four Modular project assigned to AIE:

- SIROCCO - Sustainable interregional coastal and cruise maritime tourism through cooperation and joint planning;
- SuSTowns - Enhancing sustainable tourism attraction in small fascinating MED towns;
- TOURISMED - Fishing tourism for a sustainable tourism development in the Mediterranean area;
- SHAPETOURISM - New shape and drives for the tourism sector: supporting decision, integrating plans and ensuring sustainability.

AIE needs to conduct Community Building activities, as Horizontal Angel, consisting in building relationship with these Modular Projects (MPs). The objective is to understand MPs' particular aims, objectives and actions, then collect and analyse their results to foster their outputs' harmonisation towards a synthesis.

Furthermore, AIE needs to contribute to transferring activities that is referring to effective transferring of the Sustainable Tourism Community's most tangible and replicable outputs and results and to ensure the realisation of transferring workshops ensuring that the outputs of the modular project are being shared with and implemented by relevant national, regional and local stakeholders involved in the transferring processes.

In addition, AIE as partner, will act as 'territorial antennas' of the Community with the scope of engaging stakeholders in the transferring activities of the project in the assigned geographical area of competence corresponding, more or less, with the territory covered by the association.

The task in particular implies the support to AIE in these activities:

- **Monitoring Modular Projects in which AIE is nominated as Horizontal Angel.** In order to achieve an effective synthesis and integration of the Community's outputs and results, the four modular projects will be regularly monitored by AIE who will act as 'horizontal angels' of the MPs.
- **Preparation of transferring workshops.** The aim of the activity is to promote the transferring of the Community's outputs and results through specific workshops taking place in strategically AIE assigned territories as territorial antenna. These territories will be coherent with the transferability plan agreed with the WP leader. The target of the workshops is to bring together policy makers, actors and modular projects' representatives in order to increasing the spatial diffusion of their outputs and improving tourism policies.

The external expert will be responsible to perform different tasks and feed some deliverables of the project. In particular the activities of the External Expert in TASK 1 and deliverables to contribute to are:

- D 4.2.2 Bi-monthly monitoring reports of the Community : the expert will take part to the interviews and to the preparation of the reports under the coordination of AIE Staff - DELIVERABLE TO PRODUCE: interview and monitoring reports.
- D 4.2.3 Reports of MPs and HPs meetings/events: the expert will contribute to the preparation of the reports under the coordination of AIE Staff - DELIVERABLE TO PRODUCE: Report.
- D 4.4.2 Transferring workshops: the expert will be in charge of the organisation of the workshops in Italy, Malta and will support the organisation of the workshops in IPA Countries and Croatia - DELIVERABLE TO PRODUCE: workshops.
- D 4.5.1: Thematic factsheets: the expert will contribute to the contents of the thematic factsheets.
- D 4.5.3: Report on transferring results: the expert will contribute to the contents of the reports.

## Task 2 – Capitalisation

The task falls within WP5 Capitalisation, of which NECSTouR is in charge as WP leader. NECSTouR developed a strategic action plans for the capitalization activities. The strategic Capitalisation objectives are: 1. To generate a capitalisation responsive environment by mapping and engaging the strategic stakeholders related to thematic and/or institutional competences; 2. To mainstream the modular projects results by its incorporation into regional, national, MED and EU policies and regulatory frameworks, transforming project outcome into a policy measure.

Territorial Antennas is a key element introduced by the Sustainable Tourism Project to ensure the success of the capitalisation process. It consists on covering one territory from the policy perspective, providing strategic advice and contacts, engaging those and facilitating networking between those and the Community of projects, organising advocacy-related meetings, support in connecting advocacy documents to current policy frameworks and representing the Community of projects within respective territory.

The project Sustainable Tourism has designated the AIE as responsible for Italy, Croatia, Malta and IPA countries in MED Programme area). The service provider will support AIE in these main activities:

- **Continue mapping of targets and policies in the tourism sector for the respective Antenna action plan.** It is expected to continue the mapping of actors to be targeted at national and regional level in the assigned area to be involved in the capitalisation phase of the project. These actors will be mainly regional authorities. Through the activity it is expected to involve the most relevant and appropriate actors in the policy dynamics.
- **Implement the Antenna Action Plans covering Italy, Croatia, Malta and IPA countries.** The service provider will support AIE in the implementation of the Antenna Action Plans.
- **Collaboration in the implementation of the capitalisation strategic plan in the assigned territories.** All the efforts will be addressed to institutional uptake of results, primarily through incorporation into regional/ policies or regulatory frameworks.
- **Supporting in the participation of regional and national debates in the A-I area.** This will be a key activity within the mainstreaming process focused on regional and national authorities that share the same institutional and policy frameworks. As antenna will be in charge of organising **(at least) one** National/Regional debate in his territory, so the Specialist will help AIE in the organisation of **one** national and regional debate.

The external expert will be responsible to performer different tasks and feed some deliverables of the project. In particular the activities of the External Expert in TASK 2 and deliverables to contribute to are:

- D 5.4.2: organisation of the national and regional debates assigned to AIE in Italy/Malta and support to the national and regional debates for Croatia and IPA Countries - DELIVERABLE TO PRODUCE : meeting

The expert will also support AIE in the following activities that will be done in collaboration with the other partners:

- 5.3.1: summer schools and trainings on Mediterranean coastal management
- 5.3.1: support to joint international events, fairs and expositions
- 5.4.1: meetings for liaising and mainstreaming with key actors
- 5.4.3: Capitalisation event in Brussels
- 5.4.4: Participation to key events at European and Mediterranean level
- 5.4.5: II MED Sustainable Tourism Convention
- 5.4.6: Update Athens Declaration

Additionally, when the activities are related to the TASK 1 and TASK 2, the Professional will support AIE staff in the activities of:

- WP1: project management;
- WP 2: communication;

All the activities can be modified and adjusted to the necessities of the project during its implementation.

As far as concerned the internal and external working relations, the specialist will:

- work in close contact with AIE project manager and staff in implementing project work plan;
- collaborates with project's administration unit in project budgeting, contracting, monitoring of project spending, financial reporting;
- Interacts with project partners;
- Interreact with relevant external actors for transferring and mainstreaming.

### **Expected schedule**

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- February 2021 – March 2021: First task achievement report;
- April 2021 – June 2021: Second task achievement report;
- June 2021 – December 2021: Final report.

### **Contractual and financial terms**

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The maximum amount available for this service is 26.000,00 € excluding VAT.

The travel and accommodation costs for the participation of the expert in the workshops and events relevant to the scope of this contract are not included in the contract. The AIE has allocated extra budget for covering travel and accommodation costs. The participation to project meetings and events will be agreed among the AIE and the expert. The expenses incurred for traveling will be reimbursed by AIE only if the working trips have been previously authorized by AIE and fully documented with supporting documents by the expert. Compatibly with COVID19 pandemic, the AIE can ask to the specialist the availability to perform his/her tasks in the headquarters of AIE secretariat for a maximum of 2 days per month.

The contract is expected to be signed in January 2021. Execution of the tasks is to start upon the entry into force of the contract, which will take place from the date on which it is signed. The service contract will last for 11 months, presumably from 01/02/2021 to 31/12/2021. A possible extension of activities may be considered by AIE in the event of project delays caused by external factors, only in the case the budget of the project will permit an extension of the contract.

In the case that the specialist has no tax residence in Croatia, but in another EU countries, the AIE will be responsible for paying the VAT in Croatia. Therefore, in such case, the fees to be charged by the consultant will be submitted net of VAT.

The fees will be paid in no.3 instalments on presentation of a duly-issued and detailed invoices:

- 1st invoice after 2 months – 20% of the total amount;
- 2nd invoice after 5 months – 40% of the total amount;
- 3rd final invoice at the end of the period – 40% of the total amount.

Other conditions for the payments:

- Satisfactory acceptance of services;
- Submission of the requested interim and final reports.

The Specialist must report to the AIE about the achievements of the entrusted tasks, by providing electronic version of the documents. Electronic files shall be editable and in Microsoft® Office or equivalent for Windows format. Moreover, upon accomplishment of each task and during the and at the end of the contract period, the Contractor must submit three task achievement reports and a final report which must be written in English.

The payment term for the invoices will be: Bank transfer within 20 days after the acceptance of the original invoice. The bank account details will be asked to the Specialist. The AIE maintains the right to require additional fiscal documentation if considered needed. The tax legislation in force at the date of acceptance of the offer will be applied.

The invoices have to include the following information:

- Header: Jadransko Jonska Euroregija (Adriatic Ionian Euroregion) - Flanatička 29, 52100, Pula (Croatia) - Croatian VAT code: OIB 87750913519;
- Invoice object: "Sustainable Tourism Project - Ref: 7MED19\_3.1\_HP\_005 (Interreg Med Programme 2014-2020) – Technical assistance for Sustainable Tourism Project. Working for the Italian, Croatian, IPA and Maltese Antennas

The AIE is not in the condition to pay in advance the invoice.

### **Requested skills and qualifications**

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- University degree or diploma. University degree or Diploma in economics and political sciences will be an asset;
- At least 5 years' experience in multi-countries / multi-partners cooperation programmes/projects; Experience in the Mediterranean will be an asset;
- Proven experience in project management of EU-funded projects is required, especially in INTERREG projects. Experience in Interreg MED 2014-2020 projects will be an asset;
- Italian mother tongue or equivalent and proficiency in English. Communication skills in other EU languages, such as Serbo-Croats, French, Spanish will be an asset;
- Knowledge and understanding of policy frameworks related to Tourism in Mediterranean area will be an asset (with particular importance of the major initiatives, programmes, projects and players active in the area).
- Capacity to manage working groups, at international level and also in the context of public administrations;
- Having VAT number as professional (or availability to request a VAT number in January 2021);

### **How to apply**

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The candidate must send in one file on PDF format to the following e-mail address: [secretariat@adriaticionianeuroregion.eu](mailto:secretariat@adriaticionianeuroregion.eu) with the following subject: "Technical assistance for Sustainable Tourism Project" by **20th of January 2021 at 12:00 a.m.** (Zagreb/Rome time GMT+1).

The application must include the following documents in English:

- Curriculum vitae (CV) in English in Europass format
- Proposed methodology for developing the service (no more than 3 pages);
- Economic offer in Euro (taking to account that the ceiling amount available for this service is €26.000 € excluding VAT).

The offers received after the aforementioned deadlines will not be evaluated. The sending of the offer does not in any way constrain the AIE to request the service in question.

Languages in which offers can be submitted: English only.

Availability of the expert until December 2021 will be considered for this contract.

## **Selection Procedure**

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The selection of the specialist will be based on the evaluation of the technical and financial offer, as well as the CV:

- Evaluation of methodological approach. Maximum 30 points.
- Evaluation of the economic offer. Maximum 10 points.
- Evaluation of the experience and CV of the candidate. Especial emphasis on knowledge and understanding of the latest policy developments on sustainable tourism and policy frameworks related to Tourism in Mediterranean basin level. Knowledge of the concept of mainstreaming and transferring. Knowledge of the activities of the Interreg MED Community on Sustainable tourism. Proven experience in project management and capacity to coordinate working groups. Maximum 40 points.

The AIE secretariat will be responsible to establish an evaluation committee which will have the full responsibility of assuring that the evaluation will be done in accordance with all public procurement rules.

The specialist that gathers the maximum score will be selected and contracted.

The financial offers will be compared with the maximum budget available for the contract (26.000,00 € excluding VAT). The applicants that exceed the maximum budget allocated for the contract will be considered unacceptable.

The results of the selection procedure will be notified only to the awarded Specialist in 10 days.

Other issues:

- The AIE will proceed to award the tender even in case a single valid candidature is received, in the case that it is considered appropriate and convenient;
- The AIE has the right to contact the applicants and conduct interviews via tele-conference if necessary, for better evaluate the candidatures;
- The AIE, as a contracting entity, reserves the right not to proceed with the awarding of contracts if no candidature is convenient or suitable in relation to the subject of the contract, without the applicants having nothing to claim, not even as a pre-contractual liability;
- The sending of the candidatures does not and in any way constrain the AIE to request the services in question.
- In case of significative budget reduction before February 2021 due to any circumstances, the AIE, as a contracting entity, reserves the right to not finalise the agreement with the selected specialist;

## **Useful references**

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Website: <https://sustainable-tourism.interreg-med.eu>

Twitter: [@MEDCommunity3\\_1](https://twitter.com/MEDCommunity3_1)

LinkedIn: [Interreg MED Sustainable Tourism](#)

YouTube: [Sustainable Tourism Interreg MED](#)

Podcast channel: [Interreg MED Sustainable Tourism Community](#)

Facebook: [Sustainable Tourism Community - Interreg Med](#)

Newsletter: <https://sustainable-tourism.interreg-med.eu/index.php?id=7247>

A series of additional documents will be facilitated after selection of the candidate.

## Contact

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In case additional information is required to submit the proposal, we kindly invite you to contact the AIE Secretariat by writing to the e-mail address [secretariat@adriaticionianeuroregion.eu](mailto:secretariat@adriaticionianeuroregion.eu)

Only relevant questions in writing concerning clarifications of the tender will be answered.

This open procedure and ToR, as procurement documents, is available for consultation on AIE website under the subsection "Jobs & Tenders".