



Sustainable
tourism

Interreg
Euro-MED



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the European Union

TERMS OF REFERENCE FOR THE SELECTION OF AN EXPERT TO DEVELOP STUDY VISITS AND OPEN CALLS PLANS TO FACILITATE THE TRANSFERRING PROCESS

*In the framework of the Euro-MED
Community4Tourism Project*

Developed by:



Issue date: 22/01/2025

Deadline for submission of offer: **03 February 2025**



A project labelled by the UJM



Union for the Mediterranean
Union pour la Méditerranée
الاتحاد من أجل المتوسط



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1. Background information

The tenderer

This call for tenders is developed by the Adriatic Ionian Euroregion ([AIE](#)) in the framework of the activity 2.3 “*Complementing and supporting transferring and capacity building*” of the Interreg Euro-MED Thematic Community project Community4Tourism.

The 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 Community4Tourism Thematic Community project, co-financed by Interreg Euro-MED Programme 2021-2027. The Interreg Euro-MED programme is a transnational European Cooperation Programme for the Mediterranean area. The Programme is co-financed by the ERDF (European Regional Development Fund).

Description of the project and specific objectives

Community4Tourism is an [Interreg Euro-MED](#) Thematic Community project coordinated by the Barcelona Provincial Council.

The partners are: Barcelona Provincial Council, University of Thessaly, Adriatic and Ionian Euroregion, CPMR, NECSTour, UNIMED, Plan Bleu, University of Tirana.

The Adriatic Ionian Euroregion (AIE) coordinates the Work Package 2 – Transferring.

The project is based upon the main objective of improving better governance of cooperation, both policy governance and multi-sectoral, multi-level and transnational territorial governance, with a strong focus on environment and climate, promoting a smarter and greener Mediterranean, which is in line with the European Green Deal, the Sustainable Development Goals of the United Nations and the Territorial Agenda 2030 and other key initiatives such as the Glasgow Declaration on Climate Action in Tourism.



It integrates the 4 Programme's specific objectives, as tourism has shown itself to be a transversal issue in the MED area, involving all kinds of stakeholders, agents, and territories. It will address its activities to pursue the consolidation of a competitive innovation ecosystem, support a circular economy, promote climate change adaptation, and enhance nature and biodiversity. As a result of its activities, it will produce jointly developed solutions and promote cooperation across borders.

The Interreg Euro Med programme funds projects willing to bring solutions to address 4 complimentary missions and to find concrete and shared solutions to global challenges such as the transition towards a climate-neutral and resilient society.

These 4 missions are: (1) Strengthening an innovative sustainable economy, (2) Protecting, restoring and valorising the natural environment and heritage, (3) Promoting green living areas and (4) Enhancing sustainable tourism.

Each mission integrates two governance projects (the Thematic Community Project and the Institutional Dialogue Project, allocated under the governance priority), plus a number of Thematic Projects that will be approved through different calls (these allocated under the programme's priorities of Smarter Mediterranean and Greener Mediterranean).

The Thematic Community Project (TCP) of the Mission Sustainable Tourism, hereafter Community4Tourism project, is one of the projects approved under the Governance Priority of the Interreg Euro-MED Programme.

The Interreg Euro Med Programme has approved in November 2023, no.10 Thematic Projects (TPs) under the Mission (4) Enhancing sustainable tourism. These project are: COOL NOONS, HERIT ADAPT, LIBECCIO, MAST, MedDiet Go, MED-GIAHS, MED-Routes, NaTour4CChange, SMITour, TOURISMO.

The Interreg Euro Med Programme is expected to approve in spring 2025 other thematic projects (4 / 5) under the Mission (4) Enhancing sustainable tourism.

Community4Tourism will interact and give support to all these Thematic Projects, supporting them during their project implementation and by developing different activities, mutual exchanges, joint synergies within this community of project, as well as with other external actors and initiatives.



More specifically, Community4Tourism aims at:

- facilitating the exchanges and the development of synergies between thematic projects at Med level;
- developing technical knowledge embedding the results of the projects and strategies;
- supporting the effective transfer of their results to other territories or stakeholders;

The project Community4Tourism has been split into three Work Packages:

1. Work Package 1 - Re-use: aims at facilitating the exploitation, sharing and reuse of knowledge, experiences and project results by other Euro-MED projects or other programmes to foster the production of relevant work, and establish conditions to develop synergies between projects.
2. Work Package 2 – Transfer: aims at encouraging the transfer of practices and results to other actors and territories and their integration in the development of local, regional, national, and European (mainstream) policies and strategies.
3. Work Package 3 – Coordination: aims at increasing coordination between actors in the MED (multi-level, transnational) based on the acquired knowledge, experience, and results. Improve synergies responding to Mission challenges and contribute to the macro-regional and sea basin strategy.

To know more: <https://sustainable-tourism.interreg-euro-med.eu/>

Objective of the Terms of Reference

This call is part of the Deliverable “D.2.3.3 Study visits plan for policy /decision makers”, coordinated by AIE, with the support of the other project partners. Through this deliverable under the activity 2.3 “*Complementing and supporting transferring and capacity building*”, AIE will coordinate the production of:

- 1) a study visits plan for policy and decision-makers.
- 2) a plan for open calls aimed at facilitating the transfer of Thematic Project results to other Mediterranean territories



This activity will be carried out in close collaboration with the territorial antennas - partners of the Community4Tourism project - responsible for specific Mediterranean countries

In 2025, a study visits plan for policymakers will be developed to support the transfer process. The project envisions that policymakers and decision-makers will travel, preferably to other countries, to visit pilot areas and destinations involved in selected Thematic Projects. These visits aim to allow participants to observe and learn from the implementation processes and tangible outcomes of the Thematic Projects.

The AIE is subcontracting a service essential for the implementation of Activity 2.3 within the Community4Tourism project. This initiative aims to initiate planning and, between February 2025 and February 2026, produce two concrete plans: one for the study visits and another for the open calls. Both plans are designed to contribute to the primary objective of the Work Package (WP) Transfer.

To achieve this, AIE intends to select a consultant or consulting firm to support the implementation of Activity 2.3, beginning with the preparation of the related deliverable.

Context of WP activities

The AIE is coordinator of Work Package 2 – Transfer. The WP2 aims at encouraging the transfer of practices and results developed by the projects of the Community (so far 10 projects have been approved by the programme and other 4 or 5 project will be approved in Spring 2025) to other actors and territories and their integration in the development of local, regional, national and European (mainstream) policies and strategies. The final output of WP2 Transfer is the creation of at least two (2) joint solutions to support transferring activities.

WP2 Transfer is composed by different activities, such as:

- Activity 2.1 - Analyses on replicability conditions of thematic project results
- Activity 2.2 - Creating and consolidating networks to facilitate transferring and mainstreaming processes
- Activity 2.3 - Complementing and supporting transferring and capacity building



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- Activity 2.4 - Interreg Euro-MED Academy
 - Activity 2.5 - Coordinating with Institutional Dialogue Project (IDP) and Joint Secretariat (JS)

The AIE is responsible for coordinating and supervising all the above-mentioned activities in close collaboration with the other partners (in particular with the Lead partner, the task leaders of the WP and with the Thematic Projects).

In 2025, AIE will have to start planning the production of the Deliverable D.2.3.3 Study visits plan for policy /decision makers and open calls for transferring.

Purpose and expected outcome of the work

As part of WP2 - Transfer of Community4Tourism Project, the AIE seeks a specialised consultant or consulting firm to plan and deliver two key documents:

- 1) A Study Visits Plan for policymakers and decision-makers.
- 2) A Plan of Open Calls for Transferring.

The expected outcomes include the creation of two comprehensive documents with a clear and actionable methodology to facilitate the transfer process of selected Thematic Projects under Mission 4. The study visits will aim to provide insights into the concrete pilot activities and results achieved by these Thematic Projects.

The consultant will coordinate the development of these plans while overseeing the implementation of Activity 2.3 - "Complementing and Supporting Transferring and Capacity Building." Specifically, the consultant/consulting firm will:

- Participate in and contribute to the 2025 Mediterranean Clusters annual event, scheduled for Summer or Autumn 2025.
- Maintain contact with Community4Tourism partners and members of the four Mediterranean Clusters.
- Attend monthly online technical meetings and, if required, semi-annual Steering Committee meetings.

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



Other requirements

As far as concerned the internal and external working relations, the consultant or consulting firm will:

- work in close contact with AIE's project manager and staff;
- collaborate with the project's administration unit in project budgeting, contracting, monitoring of project spending, financial reporting;
- interact with Project Partners and Thematic Projects;

The consultant or a representative from the consulting firm will be required to:

- Attend coordination meetings at the AIE Secretariat office in Campobasso as needed, approximately on a monthly basis. These meetings will be scheduled in advance.
- Submit reports to AIE detailing the activities carried out and the results achieved in alignment with the scope of work. The reports should also include any supporting documentation.

It should be noted that the consultant/consulting firm will not be entitled to reimbursement for travel or accommodation expenses incurred for attending meetings at the AIE Secretariat office.

Expected Schedule

The contract with the consultant/consulting firm is expected to start in February 2025. A tentative schedule, which can be refined in the applicants' offers is the following:

- February 2025: Formalisation of the contract;
- Mid-February 2025: Start of the activity and preliminary meeting with AIE and partners to plan the activities;
- March/April 2025: participate to the second round of on-line meetings of the Mediterranean Clusters;
- April/June 2025: Develop detailed drafts of both plans, by creating two comprehensive plans outlining the structures, contents, objectives and budgets.



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- June or October 2025: Participate to the 2nd annual meeting in presence with the Mediterranean Clusters;
 - October 2025: Update the plans.
 - January-February 2026: Deliver the two plans.

2. How to reply to this Tender

Profile of the tender

The profile of the applicants (self-employed individual or company) must comply with the following criteria:

EXPERIENCE

- At least 5 years of experience and proven knowledge of EU-funded projects, especially in INTERREG. Experience in the Euro Mediterranean area will be an asset;
- Relevant experience in sustainable tourism in the Mediterranean region and a good knowledge of actors and governance processes in Euro-Mediterranean countries;
- Experience and ability to engage Euro-Mediterranean stakeholders (policy decision-makers and DMOs);
- Proven communication skills and ability to mobilise information and existing knowledge in an efficient way.
- Strong conceptual and synthesis abilities in drafting plans, documents and project deliverables.
- Capacity to work in working groups, at international level;

EDUCATION

- University degree or diploma of the self-employed individual and/or of the representative of the company.

LANGUAGE SKILLS

- Fluency in English with proven technical writing skills. Working knowledge of other Euro-Mediterranean languages (such as Serbo-Croat, Italian, French, Spanish, etc.) will be a plus for working with the AIE team and the other partners.



OTHER

- In case the applicant is a self-employed individual, he/she must already have a VAT number as professional.

How to Apply

The applicant must send the offer **before 23:59 (CET) on 03 February 2025**, via email to secretariat@adriaticionianeuroregion.eu

The email must have the following **subject: "Development of the study visits and open calls plans – Community4Tourism"**.

The offer must be sent in **PDF format** and must contain:

- The **methodological approach** that will be followed for the development of the service (no more than 3 pages);
- The description of the **organisation's experience and/or the concise Curriculum Vitae** of the candidate.
- The **economic offer** (taking into account that the ceiling amount available for this service is 12.000,00 €, excluding VAT).

The offers must be submitted exclusively in English.

The offers submitted after the specified deadlines will not be considered for evaluation.

Submitting an offer does not obligate AIE to request the service described.

3. Evaluation of the offers

Review of Proposals and Awards Criteria

The selection of the consultant/consulting firm will be based on the evaluation of the technical and financial offer, as well as the experience:

- Evaluation of methodological approach. **Maximum 30 points.**
- Evaluation of the experience of the organisation and/ or concise CV of the candidate. **Maximum 40 points.**
- Evaluation of the economic offer. **Maximum 30 points.**



The AIE Secretariat will form an evaluation committee, which will be fully responsible for ensuring that the evaluation is conducted in compliance with all public procurement regulations.

The financial offers will be compared with the maximum budget available for the contract (12.000,00 € excluding VAT). The applicants that exceed the maximum budget allocated for the contract will be considered unacceptable.

The consultant/consulting firm that gathers the maximum score will be selected and contracted.

The results of the selection procedure will be notified only to the awarded provider in maximum 10 days after the final evaluation by the AIE evaluation committee.

Awarding

The contracting authority will award the final contract to the proposal deemed to be the most economically and technically advantageous, with a decision that is expected to be taken in mid-February 2025.

4. Contractual and financial terms

Contracting Authority

Adriatic Ionian Euroregion (AIE) - Jadransko Jonska Euroregija (JJE)
Branitelja Dubrovnika 45 – 20000 Dubrovnik (Croatia)
VAT/OIB: 87750913519

Budget

The maximum amount available for this service is **12.000,00 €, excluding VAT**.

The travel and accommodation costs for the participation of the expert in the project meetings 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 in project meetings and events will be agreed among the AIE and the contractor. The expenses incurred for travelling will be reimbursed by AIE only if the working trips have been previously



authorised by AIE and fully documented with supporting documents by the contractor.

Contracting, financial terms and payment

The contract is expected to be signed in February 2025. 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 **12 months**, presumably **from 20/02/2025 to 20/02/2026**.

A possible extension of activities may be considered by AIE.

The acceptance of the offer of the successful tender implies the acceptance of the conditions and schedules detailed in these ToRs.

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/consulting firm will be submitted net of VAT.

The remuneration for the service will be paid in three (3) instalments upon presentation of duly issued and detailed invoices:

- 1st invoice after 5 months – 40% of the total amount;
- 2nd invoice after 10 months – 40% of the total amount;
- 3rd and final invoice at the end of the period – 20% of the total amount.

The consultant/consulting firm must report to the AIE about the achievements of the entrusted tasks, by providing an electronic version of the produced documents. Electronic files shall be editable and in Microsoft® Office or equivalent for Windows format. Moreover, upon accomplishment of each task and during and at the end of the contract period, the contractor must submit three (2) 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 consultant/consulting firm.



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) - Branitelja Dubrovnika 45 – 20000 Dubrovnik (Croatia) VAT code: OIB 87750913519;
- Invoice object: “Community4Tourism Project - Ref: Euro-MED0100002 (Interreg Euro-Med Programme) – Study visits and open calls plans to concretise the transferring”.

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

Other issues

- 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 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 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 due to any circumstances, the AIE, as a contracting entity, reserves the right not to finalise the agreement with the selected consultant/consulting firm.
- In the spirit of cooperation and exchange, the ownership of the work covered by the contract related to the present Terms of Reference and co-funded by the Interreg Euro-MED Programme is open to the public and free of rights. The deliverables and results of the project should be accessible and available to the general public for free and in a usable format. The Managing Authority/Joint Secretariat and any other relevant Programme stakeholder can use them for information and



communication purposes. The authorship of the work covered by the contract related to the present Terms of Reference is co-shared between the author and all the partners of the engaged project.

- Despite the public execution of the project, part of the information exchanged for the development of the purpose of this contract between the AIE and the selected contractor may be confidential. On this basis, only the documents and other pieces of information provided explicitly with the statement “confidential” will be dealt with as such. The contractor ensures that it respects its confidentiality and does not disseminate it, forward it to third parties or use it without prior written consent from the AIE.

Contacts

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.

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

This open procedure and ToR, as procurement documents, are available for consultation on AIE’s website (www.adriaticionianeuroregion.eu) under the subsection “Jobs & Tenders”.