



ANNEX II: TERMS OF REFERENCE

Support in-house for the research and innovation dossier - 12 - PRO504HER-2024

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1. BACKGROUND INFORMATION

1.1. Partner country

N/A

1.2. Contracting Authority

Secretariat of the Union for the Mediterranean (UfMS or Contracting Authority)

1.3. Relevant background

Created by the Euro-Mediterranean Heads of State and Government meeting in Paris on 13th July 2008, the UfM Secretariat is a multilateral partnership composed of 42 countries (27 EU Member States and 15 Southern and Eastern Mediterranean Countries) with the mandate of enhancing regional cooperation and integration between both shores of the Mediterranean Sea.

The Secretariat of the Union for the Mediterranean is the first permanent structure dedicated to the intergovernmental Mediterranean partnership. The Secretariat is the platform to operationalize and follow-up decisions taken at political level with a view to monitoring the progress in the implementation of Ministerial Declarations' commitments and promoting the initiatives, programs and projects intended to foster cooperation in the region.

Its multi-partner approach is crucial for seizing opportunities through the exchange of best practices sharing of experiences, identifying new and innovative methodologies and developing regional and sub-regional networks, following the principles of co-ownership and variable geometry and in collaboration with other key stakeholders in the Euro-Mediterranean area.

Science and research are established tools of cooperation, including at a regional level in the Mediterranean region.

The Union for the Mediterranean (UfM) has highly regarded the role of research and innovation since many years, as it has promoted through its multistakeholder platforms informed dialogue between experts, governments and diplomats on its six priority areas.

The activities of the UfM Secretariat on Higher Education and Research aim at contributing to the implementation of SDG 4 *"Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all"*, but also SDG 8.6 *"Reduce the proportion of youth not in employment, education or training (NEETs)"*. Furthermore, questions related to gender equality and women empowerment (SDG 5), reducing inequalities (SDG 10), environment (SDG 15) and climate action (SDG 13) are mainstreamed throughout the UfM Secretariat action. Gender equality is highlighted in all the events and studies fostered by the UfM Secretariat, and bridging the gender gap on the STEM careers, for example, is a constant concern.

In line with the conclusions set by the Euro-Mediterranean Ministerial Conference on Higher Education and Scientific Research ([Cairo, 2007](#)), the Ministerial Declaration of the UfM Employment and Labour Ministers ([Cascais, 2019](#)), the UfM Ministerial Declaration on Research and Innovation ([Paris, 2022](#)), as well as the recommendations of the Joint Communication "Renewed partnership



with the Southern Neighbourhood: A new Agenda for the Mediterranean”(2021), supporting skills development and the employability of researchers and students of the region are key priorities of the UfM.

1.4. Current state of affairs in the relevant sector

The size and scope of global challenges need to be addressed through global and multidimensional approaches, such as in the case of joint actions on climate and environment, sustainable economic growth, or global health. This holds true also for the Euro-Mediterranean region, an area where cultures and science met and mingled for millennia. In this context, regional multistakeholder cooperation through science is fundamental in order to achieve sustained systematic efforts leading to the creation of innovative and inclusive solutions. The creation of such opportunities requires the establishment of appropriate partnerships among key stakeholders, including scientists, policymakers and diplomats.

This applies in particular to many areas where science-based cooperation is required in order to achieve common goals, for instance on fields of sustainable development where research and innovation have a significant role, such as climate action, sustainable food systems, water, and blue economy. This cooperation model offers opportunities to create stronger human and knowledge links binding together the Mediterranean shores, creating a knowledge bridge for scientists and researchers to come together and tackle issues of common interest, resulting in an outcome great than the sum of individual or national efforts.

The main political commitments on Research and Innovation are issued by the first UfM Ministerial Declaration in Research and Innovation (Paris, June 2022). The Declaration acknowledged eight Roadmaps on the three agreed priority themes in the field of research and innovation (Health; Climate change; and Renewable Energy).

Other strategic political priorities highlighted include the support to a dedicated Implementation Plan, committing to mobilising resources including from national funding agencies and creating, where possible, synergies with bilateral programmes, Research and Innovation (R&I) actions, capacity building actions, research infrastructures, coordination and communication actions (creation of a web portal to be hosted by UfM Secretariat) and horizontal integration/cross-cutting issues.

Other relevant aspects of the Ministerial Declaration will be followed up, including supporting the Partnership for Research and Innovation in the Mediterranean Area (PRIMA) programme as a unique research and innovation platform enabling addressing complex societal challenges in the region, aligned with the overall priority themes and, participating in the implementation and deployment of Mission “Restore our Ocean and Waters by 2030”, including its “Mediterranean zero pollution lighthouse” and other EU Missions.

Follow-up actions to the Ministerial will be supported, among other actors, by UfMS, including the Mediterranean Initiative, included in the Horizon Europe Work Programme for 2023-2024. The UfMS will support the involvement of UfM Member states through meetings focusing on capacity building,

matchmaking and awareness raising on existing opportunities.

Complementary objectives include science diplomacy as a tool for cooperation, science-to-policy interface, and developing researchers' career, skills, and mobility.

Finally, further synergies will be sought between the UfM Political Framework with 5+5 Dialogue Ministerial Conference on Research, Innovation and Higher Education (Nouakchott, 2022), contributing to the Work Plan in the areas where complementariness can be found at Euro-Mediterranean level.

2. OBJECTIVE, PURPOSE & EXPECTED RESULTS

To assist the UfM Research and Innovation team with the in-house, day to day preparatory and follow up work related to the Research and Innovation dossier, in particular organisation of meetings, presentations, speaking points in EN and FR, collection of info material, participation to online events, minutes of meetings, concept notes, projects monitoring and reporting, update of the Research and Innovation Focal Points and Stakeholders lists, etc.).

3. ASSUMPTIONS & RISKS

3.1. Assumptions

- The ability to be responsive to the UfM Higher Education and Research Division (HER) needs, adopting an inclusive approach and using information appropriately.
- The degree of cooperation and willingness of the various member countries, promoters and partners.

3.2. Risks

- Ineffective coordination of the activities.
- Lack of responsiveness or loss of interest of partners.
- Sanitary crisis affecting mobility.
- Shifting political and institutional framework in the region.

4. SCOPE OF THE WORK

Under the overall supervision of the DSG and the direct supervision of the project manager of Higher Education and Research, the Contractor will undertake the following tasks:

- Provide technical assistance to the Division on research and innovation related matters.
- Contribute to the in-house technical and logistical preparation of UfM research and innovation related meetings, events, webinars, and studies. Thus, supporting the implementation of the UfM Ministerial on Research and Innovation (*organisation of meetings, presentations, speaking points, translations in EN and FR, collection of info material, participation to online events, minutes of meetings, concept notes, projects monitoring and reporting, update of the Research and Innovation Focal Points and Stakeholders lists, organisation of the R&I files, etc.*).
- Assist with the in-house follow up to UfM labelled projects in the field of research and innovation in cooperation with the project's promoters, namely assist in monitoring project work plans and progress, and assessment of results; contribute to identify funding opportunities for UfM labelled initiatives/projects; contribute to ensure that the reports are available on a biannual basis



according to the UfM schedule and in the UfM standard format; contribute to identifying lessons learnt and best practices.

- Support the internal divisional communication and external dissemination activities in the areas of intervention (web news, twitter, social media graphic cards, etc.).
- Perform 2 (two) missions as instructed in the UfM region in order to support during the organization of UfM events, conferences, training.
- As requested, support procurement processes related to the sectors of intervention (supporting in drafting Terms of References and related documentations, etc.).
- Contribute to monitor developments in the sectors of intervention.
- Contribute to build cooperating opportunities with other divisions of the Secretariat.
- Other tasks as may be needed during the implementation of the assignment.

4.1. Results to be achieved by the Contractor

○ Requested services

Work package 1: Support the research and innovation policy dialogue activities

As instructed, the Expert is expected to assist with the preparatory work (presentations, technical documents, concept notes, support to the organization of the event/s also online, collecting and preparing bios, draft agendas, communication material, social media cards, etc.) related to events connected to Research and Innovation. The final list of events will evolve during implementation, but in terms of determining workload the current draft list of activities includes:

- The 30th /31st UfM Regional Platform on Research and Innovation (October 2024/Cairo; 2025 Barcelona) and
- The UfM/League of Arab States/EU High-level Meeting on Science Diplomacy (October 2024).
- The UfM-JRC Conference on Science for Policy (Early 2025/South Med).
- Conference on Innovation and employability/Academia-to-Business Forum.

Up to two missions is foreseen to take place in order to support the organisation of an activity, with different support tasks as instructed, including note taking, minutes, managing relations with venue and partners, welcoming, etc.

Work package 2: Supporting the UfM labelled project activities/Studies/Webinars

As instructed, the Expert is expected to assist to manage the organisation of up to two webinars. As instructed, the Expert is expected to assist with the collection and presentation in the UfM format of the inception and progress reports of the UfM labelled projects; assist with the conversion in the UfM template of projects advanced for labelling; and in the preparation/compilation of related documentation; assist in the information to be in the UfM project database. As instructed, the Expert is expected to contribute with overviews and desk research to draft ToR/articles, for instance for the preparatory work/follow up work for launching a Study on the State of Research and Innovation in the Mediterranean.

Work package 3: Other divisional tasks

- Assist with translations, minutes, notes, as appropriate.
- Support with the organisation of events/webinars/studies as mentioned in WP 1 and 2.
- Any other relevant task as required.



Required outputs

In close consultation with the DSG and the Project Manager, the Contractor shall produce:

1. Prepare a concise strategy/methodology and work plan on activities foreseen in Work Package 1, 2, 3 to be carried out during the assignment.
2. One Interim Reports in 2024 – Report on the operationalization of the activities carried out under Work Package 1, 2, 3 and include all Annexes; in particular
 - Presentations, technical documents, concept notes, etc. run in 2024.
 - report on the projects-related activities carried out in 2024 (presentation, technical project documents, etc.)
 - the up-date of the shared R&I files, ensuring that all relevant information is classified in the files by topics, in an intuitive and well-structured manner; and the report on the other tasks developed under WP 3.

The contractor is requested to add an indication of the activities to perform in 2024, based on the consultations with the DSG and the Project Manager.

3. One Interim Reports in 2025 – Activities in 2025: Report on the implementation of the activities carried out in Work Package 1, 2, 3 including all annexes; in particular:
 - Presentations, technical documents, concept notes, etc. run in 2025
 - report on the project-related activities carried out in 2025 (presentation, technical project documents, etc.)
 - the tasks developed under WP 3 in 2025.
4. Final report – the final report is to be focused on the results achieved with respect to the three Work Packages, summarize on useful 'lessons learned', suggestions, or problems encountered during the implementation of the activities as well as indicate new potential partnership/projects development/funding opportunities, etc. to be further developed.

4.2. Project management

4.2.1. Responsible body

The project will be managed by UfM Higher Education and Research Division.

All issues related to the technical elements in relation to this contract, mainly the specific activities as outlined in section 4.1. of these Terms of Reference, shall be taken by the project manager nominated by the contracting authority pursuant to special conditions of contract Article 2.1. The project manager will ensure these tasks in accordance with UfM internal rules and procedures.

5. LOGISTICS AND TIMING

5.1. Location

The services shall be carried out from remote, with weekly appointments and working sessions with the UfM Secretariat to be carried out via phone/Teams (and in person, if conditions allow and if so requested by the Manager).



Project management and training activities shall be carried out in the Contractor's premises or any other premises at the expense of Contractor. Any mission related to the purpose of the contract will be performed by the Contractor at his/her own expenses and cannot be subjected to expenses claims to the UfM Secretariat.

The expert will be asked to be at UfM Barcelona based premises once bi-weekly and when needed, upon previous agreement with the managing authority.

5.2. Commencement date & Period of implementation of tasks

The intended commencement date is in June 2024 and the period of implementation of the contract shall be from start up to the 31st of December 2025.

6. REQUIREMENTS

Tenders deviating from the requirements or not covering all minimum requirements described below may be rejected on the basis of non-compliance with the tender specifications and will not be further evaluated.

6.1. Staff

Note that civil servants and other staff of the public administration, of the partner country or of international/regional organisations based in the country, shall only be approved to work as experts if well justified. The justification should be submitted with the tender and shall include information on the added value the expert will bring as well as proof that the expert is seconded or on personal leave.

6.1.1. Experts

All experts who have a crucial role in implementing the contract are referred to as experts. The profiles of the experts for this contract are as follows below.

The description of the expert profile - Research and Innovation Consultant - is mandatory. The tenderer is free to decide the number, composition and size of the team, provided the minimum requirements of the terms of reference are fulfilled. The tenderer should not propose specific individuals as members of the team or submit CVs, but instead should indicate the profile of each team member stating the status, qualifications and experience of the members, along with their specific roles and responsibilities in the implementation of the framework contract. The profile in the tender for the Research and Innovation Consultant must meet the minimum requirements individually and for the team as a whole, as set out in the Terms of Reference point 6.1. Tenders that do not meet these minimum requirements may be considered not compliant with the technical requirements of the tender dossier and may be rejected.

Expert: Research and Innovation Consultant

One Expert is to be provided to carry out the assignment. The Contractor shall ensure that all services will be provided and where necessary supplementary support/expertise will be provided through back-stopping and will be included in the offer.



Qualifications and skills

- Education at least up to a University Degree¹ (where a university degree has been awarded on completion of four years study in a university or equivalent institution) in Research Management, Policy, Economics, Political Sciences, International Relations and/or any other relevant scientific field.
- Working knowledge and fluency in English and French, oral and written (also for reporting purposes); Arabic and Spanish would be an asset.

General Professional Experience:

- Minimum 5 years' experience in the research and innovation area, with preferred focus on the topics falling within the UfM Ministerial Declaration on Research and Innovation and Science diplomacy/science policy, management of research.
- Good knowledge of the Mediterranean basin.
- Good knowledge of the UfM structure and of the Higher Education and Research Division and activities.

Specific Professional experience

- Organizational and multitasking skills; project management experience; Proven ability in liaising with relevant partners and animate the collaboration.
- Ability to work for an international organisation.
- Knowledge of the specific socio-, politic-, economic-, environmental and R&I challenges of the Mediterranean region would be appreciated.
- Experience in providing support of similar nature.

All experts must be independent and free from conflicts of interest in the responsibilities accorded to them.

All experts shall comply with the UfM internal rules, procedures and guidelines.

6.1.2. Other experts, support staff & backstopping

The costs for backstopping and support staff, as needed, are considered to be included in the tenderer's financial offer.

6.2. Equipment

No equipment will be purchased by the Secretariat under this contract.

¹ For reference on equivalent qualifications see EPSO website - Annex 1, (see the EPSO website: www.eu-careers.eu)

7. REPORTS

7.1. Submission & approval of reports

The reports must be submitted to the Project Manager. The Project Manager is responsible for approving the reports.

Following the comments received, if any, the Contractor will send a revised version by e-mail, before formally submitting the final version.

The approved version of the final report shall be submitted in two copies (one hard copy plus **one electronic version** (MS Word format) to the Project Manager. These final versions must be accompanied by the final invoice.

The Secretariat will provide its comments on the submitted Inception report, Interim report and Final report, within 15 working days upon receipt, according to the above indicated timing.

To summarise, the Contractor shall provide reports as per Table below; payments will be done accordingly.

Name of report	Content	Time of submission
Inception report	Work plan and working modalities as per point 1) of required outputs	No later than 2 weeks after the start of the implementation
Interim report 1	Status of the advancement in project activities, in line with the agreed strategy/methodology and work plan, plus annexes (WP 1,2,3) and the set outputs	By December 2024
Interim report 2	Status of the advancement in project activities in line with the agreed strategy/methodology and work plan, plus annexes (WP 1, 2, 3) and the set outputs	By June 2025
Final report	Full description of the all activities carried out and results achieved, plus annexes (<i>including outcomes and achievements; problems encountered and recommendations for follow up; 'best practices and lessons learned'; partnership/projects development/funding opportunities as per output 3</i>)	No later than 15 days before the end of the assignment in December 2025

➤ **Content:**

It is essential that the expert maintains close dialogue with the UfM Secretariat and its partners. The UfM Secretariat must be kept informed of the project progress, through regular contacts and at least monthly conference calls.

➤ **Language:**

The reporting language, as well as all writing communication between the Secretariat and the Contractor, will be in English. The working languages will be English (French, Spanish and Arabic, as applicable).