



Terms of Reference Call for Tenders for External Trainer(s) in Research and Innovation policy

Title	Call for Tenders for External Trainer(s) for Seminar in Research and Innovation policy
Task Lead:	CeRISS
Related Work-package:	WP4
Related Task:	T4.1 – Activity 4.1a Training seminars in Research and Innovation policy
Author(s):	George Bonas, CeRISS Yannis Kechagiarias, CeRISS Serkan Karas., CeRISS
Grant Agreement Number	692471
Instrument:	Coordination and support action (CSA)
Start date of Project:	01/09/2016
Duration:	36 months



The project EaP PLUS has received funding from Horizon 2020, the EU Framework Programme for Research and Innovation, under the Grant Agreement 692471 (H2020-INT-INCO-2015)

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1 Conditions of Tender

The Conditions of Tender are the conditions upon which the EaP PLUS will receive and evaluate Tenders, as described below. Failure to strictly observe these conditions may result in a Tender being excluded from further consideration. The Terms of Reference will be published at www.ceriss.eu , www.eapp-plus.eu and other partner websites.

2 Tender Closing Time

Tenders conforming to this Call for Tenders must be lodged in accordance with these Conditions no later than on 25 August 2017.

3 Introduction

3.1 The Project EaP PLUS

The project 'STI International Cooperation Network for EaP Countries Plus (EaP PLUS)' aims to stimulate cooperation between researchers from the EaP countries and EU MS, and enhance the active participation of the Eastern Partnership countries in Horizon 2020 Framework Programme.

The EaP PLUS started on 1 September 2016 and will end on 31 August 2019. It is implemented by a consortium of 17 partners from the EU Member States and all the six EaP countries, i.e. Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine.

Detailed information on the project is available at its website:

<http://www.ceriss.eu/h2020/92/eastern-partnership-plus-%28eap-plus%29>

OR at CORDIS:

http://cordis.europa.eu/project/rcn/199620_en.html

3.2 Objectives of the Call for Tender

The 'High-Level Seminar on Research and Innovation Policy' is organised under the EaP-PLUS project. The Seminar takes place on 7th and 8th November 2017 in Athens. Seminar language is English. With this Call for Tenders, we are looking for experienced experts from the fields of science, technology and innovation policy to provide sessions in Athens on the following topics:

- i. Innovation Measurements,
- ii. Performance measurement of organisations,
- iii. Benchmarking Exercises.

4 Task Description

4.1 Goals and expected results

One of the objectives of the project is to inform and coach STI policy makers and stakeholders from EaP countries in topics covering a range of pertinent issues which are necessary for achieving excellence and the elimination of remaining obstacles in the EU – EaP Cooperation. In this framework, two high-level policy development seminars will be implemented in Vienna and Athens. The objective of the seminars is to raise the understanding of how to make effective RTI policy interventions in the EaP countries, to upgrade aspects of their national systems of innovation and to increase their awareness on European standards and processes in certain RTI areas, including those which are necessary for successful and sustainable participation in Horizon 2020.

The seminar participants are senior experts from the Eastern Partnership (EaP) Countries from the field of research and innovation policy making and delivery. The seminar informs and discusses pertinent topics and new developments of research and innovation policy, such as new developments in IPR, International RTI Cooperation and the three topics listed above.

The ultimate impact of this seminar is to enhance scientific networks and to increase the potential of EaP partners to compete in EU's programmes, while the immediate impact is to support the design and creation of supportive national framework conditions to facilitate the achievement of this final objective.

4.2 Scope of Work & Tasks

The Call is for an expert or experts to provide a session in Athens on the following combined topics:

1. Innovation measurements
2. Performance measurement of organizations
3. Foresight Exercises

The trainer(s) should be a high-level expert(s) on the afore-mentioned topics. The draft schedule of the seminar is attached. Each training session under this call for tender(s) (i.e. Innovation measurements, Performance measurement of organizations, Foresight Exercises) will be approx. 1 hour. It should consist of sound theoretical input, practical application examples and interactive elements.

4.3 Contracting

For the implementation of this task, the selected Trainer(s) (Tender) will sign a contract with the Coordinator of EaP PLUS (CeRISS).

4.4 Tentative implementation period

Service delivered by the Trainer(s) will commence after the signature of the contract and last only for the training session(s) agreed upon.

5 Tentative Timeline for the Call for Tenders

- Deadline for Applications: 25 August 2017
- Selection of Tender: early-September 2017
- Signature of Contract: mid-September 2017
- Seminar date: 7-8 November 2017 (Athens, venue tbd)

6 Financial Offer

Travel and accommodation costs are directly covered by the organisers and must not be included in the price offer. The offer for each session can be priced up to €900 all taxes included (i.e. €450 for the preparation and €450 for the session). Thus a total of up to €2,700 can be claimed.

Up to three experts with experience in the aforementioned topics will be selected through this call's for tenders' procedure.

7.1 Required qualification/skills/experiences of the Trainer(s)

The Trainer(s) should possess:

- Profound RTI policy expertise, (minimum of 10 years of experience in the STI sphere, evidenced by a CV, and a comprehensive list of projects, research management and/or policy-making positions, teaching-training and publications in their field of expertise etc.).
- Previous experience as trainer or expert in RTI & STI policy on one or all the three topics mentioned in the Call, with preference on trainings addressing public servants, public bodies, national agencies or other policy-making and policy-delivering stakeholders.
- Excellent English language skills.
- Understanding of the STI landscape in EaP countries will be considered an asset.

7.2 Tender's Dossier

A tender for the position of the Trainer should include the following dossier:

- Application Form (see attachment)
- Detailed CV

7.3 Submission of Tender

Please submit the required documents for Tender only per e-mail to:
CeRISS - Centre for Regional and International STI Studies and Support
c/o Serkan Karas
e-mail: serkan.karas@ceriss.eu

Emails should have the following Subject: **“Tender’s Dossier for a Trainer for the Seminar in Research and Innovation policy (Athens) of EaP PLUS”**.

Deadline for the submission of a tender is 25 August (see Section 2, above).

7.4 Selection

The selection and evaluation process will be undertaken by the EaP PLUS coordinator, with the aim of determining which Tender represents best value for money to the EaP PLUS Project. The selection will be based on sessions offered and not on the whole Tender for multiple sessions. Thus, each session offered in a Tender will be evaluated separately (i.e. if a Tenderer is offering a package of multiple sessions, the Contractor can select any session(s) of the package and not the whole).

In determining value for money, Tenders will be assessed against the following evaluation criteria:

Compliance & Eligibility Criteria

Compliance with:

- Conditions of Tender (see above under 1)
- Tender’s Dossier (see above under 7.2).

Qualitative Criteria

- Capability of the Tenderer to fulfil the requirements, i.e. the Tasks (see above under 4.2) and the required qualification (see above under 7.1)
- The extent to which the Fee represents value for money;

Following the receipt of Tenders, EaP PLUS Coordinator, in its absolute discretion, may:

- (a) use any relevant information obtained in relation to a Tenderer in the evaluation of Tenders;
- (b) enter into discussions or negotiations with any one or more Tenderers; and
- (c) seek clarification or additional information from any Tenderer.

Telephone interviews with suitable candidates might be held, if deemed necessary.

7.5 Other important provisions

The Contractor reserves the right not to place any order. Costs for necessary document preparation by the applicants to this call for tender will not be reimbursed.

EaP PLUS is not obliged to select the lowest fee.

THIS CALL FOR TENDER DOES NOT FALL UNDER THE AUTHORITY OF THE HELLENIC PUBLIC PROCUREMENT LAW. NO LEGAL RIGHT SHALL BE CONSTITUTED BY THIS CALL. ANY RECOURSE TO COURTS OF LAW IS EXCLUDED.

7.6 Contracting procedure for the Trainer(s)

Only the selected *Trainer(s)* (Tenderer(s)) will be informed until early-September 2017 the latest on the result of the selection procedure. The contract with the Trainer(s) will be established by the EaP PLUS shortly after the selection (no later than mid-September 2017). As soon as the contract is concluded, the Trainer(s) will get more information about the Seminar that will take place in Athens (7-8 November 2017).

Annex I

Seminar DRAFT Agenda

Date: 7-8 November 2017

Venue: TBC/ Athens, Greece

Tuesday, November 07, 2017

Registration

Welcome

Innovation measurements [SPI and external trainer)]

Coffee break

IPR (EBN; OBI)

Lunch

Transfer to CORALLIA

Field trip: CORALLIA CLUSTER (tbc)

Transfer to OBI

Field trip: Hellenic Industrial Property Organization (OBI) (tbc)

Dinner

Wednesday, November 08, 2017

Wrap-up of the first day and introduction to the second

Performance measurement of organizations (IPPT-PAN and external trainer)

Coffee break

Benchmarking Exercises (tbc)

Lunch

International RTI Cooperation (George Bonas/CeRISS)

Foresight Exercises (external trainer)

Wrap-up discussion and closing