

Terms of reference (ToRs) for the procurement of services above the EU threshold

Project title: Sustainable Economic and regional development, employment promotion and Vocational Education and Training

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Transaction number: 81308423

Subject of the tender procedure:

Support for applications by Albanian Higher Education Institutions to Horizon Europe

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0. List of abbreviations

DEP	Digital Europe Program
GTC	General Terms and Conditions of Contract for supplying services and work on behalf of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
EC	European Commission
EIC	European Innovation Council
EIT	European Institute of Innovation and Technology
EIT CH	European Institute of Innovation and Technology Community Hub
EU4I	EU for Innovation
EUD	EU Delegation
FK	Expert
FKT	Expert days
FP	Framework Program
KOMP	Cost-output monitoring and forecast
GoA	Government of Albania
HE	Horizon Europe
HEIs	Higher Education Institutions
IA	Innovation Action
IPR	Intellectual Property Rights
ISO	Innovation Support Organisations
KOMP	Cost per output monitoring and forecast
MoU	Memorandum of Understanding
NASRI	National Agency on Science, Research, and Innovation
NCP	National Contact Point
QH	Quadruple Helix
R&D	Research and Development

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RIA	Research and Innovation Action
RMO	Risk Management Office
ToRs	Terms of reference
SIDA	Sweden's government agency for development cooperation
ToRs	Terms of reference
WP	Work Package

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1. Context

The EU4Innovation (EU4I) is a Multi Donor Action jointly co-financed by the European Union (EU), the Federal Ministry of Economic Cooperation and Development (BMZ) and the Swedish International Development Cooperation Agency (SIDA) and implemented by GIZ and SIDA from January 2023 to June 2026 (42 months).

The Action supports the Government of Albania (GoA) in achieving key objectives in the field of economic development, namely, to accelerate the transformation into a more innovation-driven and knowledge-based economy, unlocking its human capital, entrepreneurial as well and research potential and thereby increasing its competitiveness.

The specific objective (outcome) of the Action is: maturity and exposure of the Albanian start-up and innovation ecosystem and its stakeholders are increased. This objective is pursued through activities in four main result areas (outputs).

Output 1 puts capacity development (CD) addressing the start-up and innovation ecosystem at centre stage. Already existing actors and services will be strengthened to deliver qualitative and sustainable services. New public and private actors will be encouraged to enter the Albanian start-up and innovation ecosystem to complement current services. The responsibility for implementation of this output lies with GIZ.

Output 2 will improve access to finance for Albanian start-ups and Innovation Support Organisations (ISOs). As a continuation of the challenge fund managed by SIDA during phase 1, the grant scheme will target innovative (i) Micro, small- and medium-sized enterprises (MSME) / start-ups and (ii) start-ups with a prominent tech content, with the potential to go global and grow fast. It includes businesses at all stages of development (idea, validation, growth, scale-up). Next to that, GIZ will provide grants and capacity development to ISOs. Selected activities in the areas of crowdfunding, angel and equity investment complement this approach on GIZ side.

Output 3 promotes and implements the Quadruple Helix (QH) approach to generate innovation and economic growth. The target group is also open to younger generations. Paradigmatic activities include green/circular project pilots on a community level, awareness-raising events and skills development programmes, e.g., progressively integrating entrepreneurship education into university curricula. The responsibility for the implementation of this output lies with GIZ.

Output 4 promotes Albania as a start-up and innovation ecosystem and destination for international and domestic innovators and entrepreneurs. The Action will design awareness-raising campaigns and activities to encourage key actors within the ecosystem who can serve as ambassadors and role models. The responsibility for the implementation of this output lies with GIZ.

Regarding Output 3, the EU4I project aims to build research capacities of Higher Education Institutions (HEIs), including other Quadruple Helix (QH) stakeholders (private sector, not-for-profit, public sector), identified as ISOs to participate and benefit from Horizon Europe (HE) and other EU Framework Programs (FP's) in Research and Innovation. These programs include HE, the European Institute of Innovation and Technology (EIT), the European

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Innovation Council (EIC), Digital Europe Program (DEP), Eureka, European Cooperation in Science and Technology (COST), EU Missions, EU Partnerships, etc.

The participation of the private sector in these programs continues to remain low. To tackle that, the international consultant is expected to ensure the participation of all QH stakeholders in applying to the EU FPs. Albania has made progress in applying for EU funds by reaching 13,97 Mio. of Net Euro contributions in the Horizon programs¹ (European Commission, 2023). Still, there is a low number of proposals submitted by the Albanian ISOs and a low success rate of applications despite the fact there are more significant opportunities for Albanian ISO to benefit from the EU's framework programs in research and innovation. The total success rate of Albanian institutions applying for these funds is 8,74%², which is lower than the average of other countries (12,65%). In addition, Albania presents a very low ratio of proposals' eligibility (0,18%).

Most Albanian ISOs mainly apply as partners rather than lead organisations in the Horizon 2020 and HE calls, recognising the limited capacities of ISOs to draft a competitive proposal and effectively manage project implementation. According to the European Commission (2023) data, there is no Principal Investigator (PI) role in Albania's HEIs yet - *"A PI typically leads the research project, designs the study, secures funding, supervises the execution of the research plan, and is responsible for reporting the findings to the funding body."*³

Therefore, the EU4I project intends to increase Albanian ISOs' participation in these programs and upscale their role, with a focus on leading roles in consortiums. Emphasis will be given to increasing participation in HE (Activity 3.6 of DoA).

To achieve that, the project will hire an **international organisation/company** referred to as the "contractor" to provide **technical assistance to ISOs through customised training and consulting services to develop project proposals to apply in the EU FPs**. The contractor is expected to provide clear **step-by-step guidance** throughout all the phases of the project application (developing concept/research idea, project writing, consortia building, evaluation and final review) to assist the Albanian ISOs in successfully submitting **10 project applications**. At least two project submissions shall be **selected as winning applications to be funded by the European Commission (EC)**. The consultancy service is expected to strengthen Albanian ISOs' **research and project writing capacities and competencies, increase their success rate** in being selected for these programs, and **facilitate linkages between local ISO and European/international networks**. The contractor is expected to have vast experience in proposal and grant writing, project management of EU programs, and demonstrate experience in delivering tailor-made training and workshops on topics related to the EU FPs. The contractor is expected to have already built up a network of relevant academic

¹ Including FP1-FP7, Horizon 2020 and Horizon Europe Programs.

² Due to the sensitive information, there is no success rate for institutions, but at country level. This information includes even other public and private institutions' applications.

³ Alimehmeti, G. (2023) "The Research and Development Landscape in Albania – Perspectives of HEI to Participate in the Horizon Europe Programme", GIZ Albania.

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and business institutions and match opportunities to Albanian ISOs' expertise and research interests.

The contractor shall have:

- proven experience in obtaining funding from EU FPs in research and innovation (preferably Horizon 2020/HE, EIC, EIT, and DEP).
- extensive knowledge of the HE program's policies, rules, and regulations.
- proven capacity to deliver effective training and capacity-building activities.
- extensive expertise in developing quality research into innovation projects with strength in structuring and substantiating research ideas in high-quality proposals and collaborations.
- proven expertise in acquiring research funding and developing new projects and knowing the rules and regulations imposed by the EC.

There are two public institutions mandated to manage the EU programs in innovation. The National Agency of Scientific Research and Innovation (NASRI) implements the EU Framework Programs (FPs) in research and innovation, and the Ministry of Infrastructure and Energy (MoIE) is the implementing institution of DEP. The FPs in research and innovation include European Cooperation in Science and Technology (COST), Eureka, Euraxess, EU Missions, EU Partnerships and HE. NASRI is the coordinating agency and the focal point of the NCPs for the EU FPs in research and innovation, whereas the MoIE is the NCP coordinator for DEP⁴.

The EU4I project is currently commissioning two local experts, a Key Expert and a Junior Expert, who will support NASRI's capacities towards managing these programs at the institutional level. The Key Expert is the technical lead and is responsible for awareness-raising and communication campaigns; mentoring and coordinating the project proposals development phase of ISOs; leveraging the National Contact Points (NCPs) and Universities; acting as the focal point between the EU4I, the European Commission (EC), and NASRI (including its subordinate entities, such as NCPs, HEIs, Research Institutions, etc); and developing a partnership with EIT Community Hub (EIT CH) Albania. A more detailed description can be found in Annex 1 of the ToR. The Junior Expert will provide backstopping services for coordination, administrative management, communication, and assistance to NASRI and the Key Expert. A more detailed description can be found in Annex 1 of the ToR. These two experts are also commissioned to support the NCPs in strengthening their network among each other and mobilise HEIs to participate in EU FP's open calls.

The contractor commissioned to deliver the tasks described in the ToRs will work closely with the two local experts and the EU4Innovation team to reach this ToR's main goal and

⁴ [Funding & tenders \(euhttps://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/support/ncp/sortQuery=country;countryGroups=MS,AC,PAC,3C;countries=;functions=All%20Functions.2,3,4,5,6,7,8,9,10,11,12,13,14,15,16,17,18,19\)](https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/support/ncp/sortQuery=country;countryGroups=MS,AC,PAC,3C;countries=;functions=All%20Functions.2,3,4,5,6,7,8,9,10,11,12,13,14,15,16,17,18,19)

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deliverable: **submitting 10 project applications to the EU FPs in research and innovation and DEP.**

2. Tasks to be performed by the contractor

2.1 Term

The expected term of the contract for services is from October 2024 – March 2026. The term must be specified in the 'Special terms and conditions of contract'. The definitive term and service delivery period are set out in the contract award notification.

2.2 Objectives, indicators, work packages, milestones

The contractor is responsible for achieving the objectives and indicators described in this document.

Module objective.

Module objective indicator(s)

- B Number of ISOs engaged in cooperation activities with international (incl. WB6) ISOs
- D Number of cooperation agreements between supported university research clusters and local or international industry players facilitated through the Action

The mentioned Indicators to be achieved contribute to three different outputs of the **EU 4 Innovation project: Output 1, 3 and 4:**

Output indicators of EU4Innovation:

- 1.7: Number of Albanian ISOs supported for lasting collaboration with foreign ISOs/ EU ISO associations.
- 3.4: Number of researcher groups/clusters from Albanian universities have received support (match making support, workshops, and trainings).
- 3.6: Number of Albanian ISOs/ start-ups assisted to apply for support under innovation-related Union programmes (such as Horizon Europe, pillars at EIT Regional Innovation Scheme (EIT RIS), EIC and Ele once Albania has formally associated)

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and other EU initiatives including regional instruments disaggregated by “green/digital” sub-sectors.

3.7: Number of Albanian ISOs/ Start-ups assisted with successful applications to innovation-related Union Programmes and other EU initiatives, including regional instruments.

4.2: Number of ecosystem events (e.g., workshops, meet-ups, co-creation events, etc.) held, out of which at least 30% incorporating industry actors organised with the support of the project.

The contractor is responsible for providing the following work packages and for achieving the corresponding milestones:

Work package (WP) 1: part of Output 1.7 and Output: 3.6 and 3.7

Create a pipeline of relevant calls and international partners for consortia building.

1. The contractor shall revise the list of programmatic calls which has been already created by the local expert and create a unified pipeline of specific calls for proposals and funding opportunities for the ISOs. The contractor is expected to proactively identify and propose open EU open calls eligible for the ISOs to apply. Emphasis should be given to the HE programs by exploring the Funding and Tender Portal or other relevant sources where prospective calls and partnership opportunities exist.
2. Based on the outcome of these events, the contractor shall work closely with the local experts to create a funnel of potential applicants to start developing proposals. The contractor can build on the work of the local experts, who will organise monthly roundtables to identify potential project applicants.
3. Create a European map of international partners (eligible to and interested in cooperating with Albanian actors in EUFP applications) with the prospect of connecting them with the local ISOs to build consortia in developing the project proposal.

Content for WP 1 / Output 3.6	Target	Delivery period
A periodical pipeline of open calls of the EU framework programs in research and innovation, eligible for Albania.	Up to 10 annual open calls for applications	Every 6 months online (from contract start)
A periodical funnel of potential applicants	10 local and international partners per call for application	Every 6 months; online (from contract start);
Identify international partners for building consortia.	Up to 5 partners/call	Bi-Monthly updates;

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WP 1 has estimated a total of up to 40 working days.

WP 2: Part of Output 1.7 / Output 3.6 & 3.7

Support ISOs in Proposal Development and Application for EU FPs in Research and Innovation & DEP

The following tasks will be conducted in parallel. The contractor is expected to proactively identify opportunities to move the process forward efficiently and in cooperation with the partners described under WP1. Under WP 2, the contractor is expected to conduct the following tasks:

2.1 Proposal Idea and Writing

The contractor shall support the applicant institutions in developing the concept idea to be further expanded into a project proposal. This is an interactive consultation phase between the contractor and the applicant. The contractor will explain the essential steps needed to develop a successful proposal under each specific call, including its overview, objectives, evaluation criteria and proposal components. During this phase, the contractor will enable the applicant institution to understand the administration formation, the objectives and ambition of the open calls and the proposal, the methodology, the impact, quality and efficiency of implementation, and the project budget.

The contractor is expected to:

- Develop an initial structure for the proposal, ensuring it addresses the call's specific objectives.
- Collaborate with consortium partners to develop the application, including co-writing the task/content descriptions with the applicant institutions.
- Develop clear and comprehensive descriptions for the assigned WP, ensuring they align with the specific objectives and other WP.
- Integration with other WPs: Ensure the work package seamlessly fits the overall project objectives and coordinates well with other WPs.
- Support and guide partners throughout the proposal preparation process, addressing any questions or concerns.
- Keep track of application deadlines and ensure all required documentation is submitted on time.
- Set up regular monthly calls between applicant institutions and consortium members, particularly during the proposal development phase.
- The proposal writing phase is a collaboration between the contractor and the applicant institutions, who will develop parts of the proposal together with the help of Consortia partners.

2.2 Consortia Building

The contractor supports each applicant to identify suitable partners to form a consortium that aligns with the project's goals and possesses the required expertise. The contractor should have a vast network to utilise for matchmaking with local ISOs. In addition, the contract shall assist the ISOs in searching for partners in the EU funding and tender portal.

The contractor shall facilitate dialogue between the applicants and identified international partners to work towards consortia building between international and

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Albanian ISOs eager to apply together. Matchmaking activities include email exchanges, introductions, and joint calls.

The contractor shall engage with the EU4I support scheme and its actors, namely the local experts, the NCPs and the EIT Community Hub to maximise impact and create synergies for the ISOs.

2.3 Final Revision Prior Submission

The contractor will conduct a full review of the proposal before submission, with particular attention given to the evaluation criteria of the call. The contractor will check the proposal's coherence and suitability for the respective call.

The contractor shall adjust and finalise the proposal for submission.

Content for WP 2	Target	Delivery period
2.1 Proposal Idea and Writing - The contractor can conduct a pre-assessment during the training program (WP3) to help investigate which topics would be the most beneficial for the applicant institutions and the open calls for the application they will apply to.	10 project proposals on EU FPs open calls for applications and submitted project proposals	March 2026, on-site or online; the Contractor & NASRI Local Experts
2.2 Propose international partners for consortium building between Albanian ISOs and international partners	10 consortiums formed between local ISOs and international partners	March 2026, on-site or online; the Contractor & NASRI Local Experts
2.3 Finalise Proposal Revision and Submission	10 final review of project applications	March 2026, on-site or online; the Contractor & NASRI Local Experts

Up to 15 working days per submitted proposal under WP2. In total, the number of working days for 10 proposal submissions is up to 150 working days.

WP 3: Part of Output 4.2 / Output 3.6 & 3.7

Training to Applicant Institutions & NCPs

Following the mapping of the training needs of the potential Albanian ISO applicants and the NCPs, the contractor will conduct training covering four general areas as described below. All four different types of training are aimed to increase the capacity of the Albanian ISOs, which intend to apply in the EUFPs. The contractor shall compile training content for the following four blocks:

3.1 Funding Models on EU Framework Programs on Research and Innovation

The training shall cover information regarding the types of calls, including but not limited to the description and comparison of calls and case studies for preparing project budget samples for each funding model. The contractor will deliver customised training on

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project proposals to understand the **methodology of EU FPs** and ensure the project proposal fully matches the call text. In addition, the contractor can train the applicants how to write the methodology part in the application form.

The contractor will be required to conduct one 1-day training on-site in Tirana, Albania, for up to 50 participants, including researchers, NCPs and QH stakeholders.

3.2 Proposal Writing

The training will introduce the essential steps needed to develop a successful proposal for each specific call, including its overview, objectives, evaluation criteria and proposal components. The contractor shall prepare, in advance, the handouts, training guidelines, and materials for dissemination to the participants. The training materials shall include the project management diagram and guidelines, including tips and hints on how to prepare better proposals. The training will help the applicants mature their ideas and transform them into projects. The contractor shall provide a hands-on approach to project writing from a project idea to a fully-fledged proposal, to name a few topics below:

- What defines critical success factors towards the EU FPs' research and innovation open calls for applications.
- Tasks and responsibilities of a partner, lead organisation and principal investigator.
- Guide on proposal writing step-by-step: from concept note to complete proposal:
- Building a consortium vs. joining a consortium as a partner: step-by-step guidance.
- From concept to full proposal: proposal writing from the coordinators and partner's perspectives.
- How to compose text and fill in the application forms: Practical tips, examples, and ready-to-use templates for Excellence, Impact, and Implementation.
- How to ensure the proposal matches the call text: call analysis, proposal design, consortium composition, and cross-cutting issues.
- Implementation: how to design an effective work plan, define deliverables and milestones, identify risks, estimate resources, and promote your consortium – all with real-life examples and lessons learned from evaluations.
- How to design work packages and plan resources in lump sum grants.
- How to coordinate building a lump sum budget with practical tips and templates.
- How to finalise and polish the proposal before submission.
- Project Evaluation and Assessment.

The contractor is required to conduct one 3-day training onsite in Tirana, Albania for up to 50 participants, including researchers, NCPs and QH stakeholders.

3.3 Legal, Finance and Administration & Intellectual Property Rights (IPR) Issues

All training materials (handouts, presentations, guidelines) should be prepared before the training is delivered to the applicants. These manuals should cover all aspects of legal, finance, and IPR topics. Since the HE program's legal, finance, and IPR requirements change from time to time and are published by the EC, the training materials must be kept up to date throughout the project implementation in line with the EC's revisions.

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The contractor is expected to conduct one 1-day training onsite in Tirana, Albania for up to 50 participants, including researchers, NCPs and QH stakeholders.

3.4 Training on Capacity Building of NCP Network

During the first quarter of 2024, the local experts will have already identified opportunities for the capacity and competence development of the NCPs. They will develop a **work plan with the NCPs**, in consultation with MoES, NASRI and the EU4I team, consisting of their involvement during the application process of the ISOs to EU FPs in research and innovation and capacity-building activities tailored to them. Based on the previously mentioned work already done by the local expert, the contractor shall offer their know-how to the local experts to identify the existing competencies of the NCPs, understand the existing status and propose capacity building activities to the NCPs to develop their competencies.

Based on the pre-assessed needs, the contractor is expected to provide tailor-made training for NCPs in guiding choosing relevant HE topics and types of action, administrative procedures and contractual issues, distribution of documentation (forms, guidelines, manuals, etc.) and assistance in partner search. These topics aim to improve the capacities of the NCPs to conduct their general services.

Under WP 3.4, the contractor shall provide the following tasks:

3.4.1 Advise on the NCP's work plan by revising the first and final draft before finalising the work plan with MoES, NASRI and EU4I.

3.4.2 Deliver Customized Training for a maximum number of Albanian NCPs (31 based on current Albanian planning), guiding the choice of relevant HE topics and types of action, administrative procedures and contractual issues, distributing documentation (forms, guidelines, manuals, etc.), and assisting in partner search.

Under WP 3.4, the contractor must conduct one 1-day training for up to 31 NCPs in Tirana, Albania. All training will be conducted in one consecutive session.

In sum, the contractor will conduct the training on 4 topics for 6 days for up to 50 participants. The participants are ISOs, NCPs, and other QH stakeholders. The training will be held in Tirana, Albania. The logistics (date/venue) will be agreed upon between the contractor, EU4I, and NASRI.

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Content for WP 3	Target	Delivery period
Training courses on EU FPs Research and Innovation Program; Proposal Writing topic; Legal, Finance & IPR Issues; Capacity Building of NCP Network is conducted	6-day training At least 50 participants/training	Within 6 months after the signature of the contract, the Contractor
A revision of the NCPs' work plan proposes engagement of the NCPs in fostering their competencies and skills.	One Workplan	Within 6 months after the signature of the contract, the Contractor & Local Experts
Training Materials are compiled.	Handouts, Presentations & Guidelines	Within 6 months after the signature of the contract, the Contractor

WP 3 has estimated a total of up to 24 working days, consisting of up to 18 working days for preparing materials and up to 6 working days for training delivery on-site in Tirana.

WP 4: Reporting to EU4I

- 4.1 Conduct a Kick-Off meeting with the EU4I team to develop a joint work plan with the local experts and align on targets and modes of communication.
- 4.2 The contractor shall create an online tracking management system to track each applicant's application and phase, updating it regularly based on each applicant's progress. The EU4I team shall have access to this system to generate data for reporting purposes and keep track of the progress achieved with each respective consortium. The ownership of the progress tracking system shall be transferred to GIZ after the completion of the contract.
- 4.3 The contractor will have **bi-monthly calls with the EU4I team**, informing them about the progress made.
- 4.4 The contractor shall submit to the EU4I team, every four months, the revised work plan related to the description of tasks and activities of WP1, WP2, and WP3. The work plan shall include the calendar of annual activities, individual meetings with institutions, thematic roundtables, workshops, open days, training events, and participation in third-party events.
- 4.5 The contractor shall submit **six (6) progress reports (max. 5 pages)** highlighting the progress achieved with an apparent reference towards the indicators, **one interim report after 1 year from the signature date of the contract and a final report for the duration of the consultancy**. The content of the report shall be aligned together with the reporting needs of EU4I. The reporting shall be done in neutral language for documentation purposes, and it shall include an additional version in presentable form (English) to be used by EU4I to display the process of the overall impact and on the

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respective consortiums. The contractor shall inform the EU4I team if the contractor has been invited to present results related to the ToR at hands at an external event and share the presentation beforehand with the EU4I team.

4.6 The contractor shall be available to submit information to the EU4I team on a demand basis for the preparation of progress reports of EU4I to the EU Delegation (EUD) and shall respond to any EU4I request for information within the deadlines set by the latter.

4.7 The contractor manages costs and expenditures, accounting processes, and invoicing in line with GIZ's requirements.

Content for WP 4	Target	Delivery Period
Reporting	Monthly timesheets with descriptions of tasks implemented. Progress reports. One interim report for the 1 st year. a final progress report for the duration of the consultancy.	Monthly Every 3 months. One year after the signature of the contract. 31.03.2026
Update of the work plan looking forward to activities	Regular Revision of the Workplan	Every 3 months

Up to 24 working days are estimated under WP4.

2.3 Project and Knowledge Management Requirements

Requirements on the assignment of experts:

- The contractor is responsible for selecting, preparing, training and steering the experts assigned to carry out the advisory services.

Requirements on equipment and operating costs:

- The contractor makes the required equipment and consumables available and covers their operating and administrative costs.

Requirements on expenditure management and cost control:

- The contractor manages costs and expenditures, accounting processes and invoicing in line with GIZ requirements.

Monitoring and reporting requirements:

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- The contractor plays an active role in the results-based monitoring of the project. Regular monitoring activities must cover at least the following areas:
- Degree to which activities listed in section 2.2 are implemented.
- Degree to which the objectives, indicators and milestones listed in section 2.2 of these ToRs have been achieved.
- Results that have occurred in the contractor's sphere of responsibility.
- Results that have occurred outside the contractor's direct sphere of responsibility
- Risks
- Other areas:
- The contractor reports to GIZ regularly by the version of the General Terms and Conditions of Contract for supplying services and work on behalf of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ AVB) that applies to this contract.
- In addition to the brief 4-monthly reports provided for in GIZ's General Terms and Conditions of Contract, the contractor submits the following reports:
 - Interim report after 1 year from the signature of the contract (5-7 pages).
 - Final progress report after completion of the consultancy services (5-7 pages).
 - Contributions to the report to GIZ's commissioning party

Requirements for company-wide learning, knowledge and innovation:

- Contributions to conferences:
- The contractor's experts are actively involved in GIZ's sector networks.
- The contractor provides support in implementing a project evaluation with special emphasis on ensuring the effectiveness of the knowledge management process.
- The contractor expresses willingness if required, to support NASRI local experts, project assistants or staff members on temporary placements who, in the context of GIZ's separately financed training programmes for junior employees, work in and undertake special tasks for the project.

Backstopping requirements:

The contractor ensures appropriate backstopping. The following services form part of the standard backstopping package. Under GIZ's General Terms and Conditions for supplying services and work on behalf of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, these services – as well as the ancillary personnel costs – must be priced into the fee schedules of the staff listed in the tender:

- The contractor's responsibility for its own staff.
- *Ensuring* the flow of information between GIZ and the contractor's field staff.
- Process-oriented technical and conceptual steering of the consulting services.
- Steering adaptations to changing framework conditions.
- Performance monitoring.
- Ensuring the administrative management of the project.
- Ensuring compliance with reporting requirements.
- Technical support by the contractor's staff for its personnel on the ground.
- Making local use of and sharing the lessons learned by the contractor with the GIZ team.

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2.4 Data protection and information security

The provisions on data protection and information security of the current version of GIZ's General Terms and Conditions of Contract (section 1.10 Data protection) apply.

2.5 Other requirements

Safeguards and gender measures with specific reference to services:

In order to promote gender equality and avoid or mitigate possible unintended negative impacts in its area of responsibility, the contractor should implement the following measures:

- **Gender equality:**
Gender equality is a core value of the EU, a fundamental right, and a key principle in the European Pillar of Social Rights. It also constitutes a basic principle of international and regional human rights instruments that Albania has signed and ratified. This initiative will reinforce and be coherent with the 'EU gender equality strategy 2020-2025' and other EU internal and external actions by promoting gender equality, women's entrepreneurship, and labour market participation. The focus will be on creating equal opportunities, and gender mainstreaming will be ensured through gender-sensitive analysis, reviewing standards, and spreading information and publicity materials about all activities. Access to all intervention opportunities will be offered regardless of sex, ethnic origin, religion or belief, disability, age, etc. All activities will be designed with gender mainstreaming in mind to ensure the maximisation of the potential of all women and men, girls, and boys, in all their diversity and the fair and gender-equal distribution of all resources.
- **Environmental protection and climate action (climate change mitigation/adaptation):**
The contractor's assignment has no direct climate change-related impact. Still, the contract shall ensure a "do no harm principle" approach via appropriate pre-assessments of possible projects to be planned.
- **Conflict and context sensitivity:**
The contractor's assignment has no direct conflict and context sensitivity and human rights related impact. Still, the contract shall ensure a "do no harm principle" approach via appropriate pre-assessments of possible projects to be planned.
- **Human rights:**
The contractor's assignment has no direct human rights-related impact.

The contractor's staffing profile should be balanced in terms of gender and age.

3. Technical-methodological concept

In this section, the tenderer is required to reflect on the objectives and terms of reference of the tender at hand, describe the partner system and its processes in the area of responsibility and present the technical-methodological concept for completing the tasks listed in section 2 and achieving the set objectives. In addition, the tenderer must describe the design of the project management process.

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3.1 Interpretation of objectives (section 1.1 of the assessment grid)

The tenderer is required to interpret the objectives for which it is responsible. Simple repetition of the objectives formulated in section 2 of the ToRs is not desired. Rather, the contractor is to describe and interpret the changes in the partner system that are to be directly achieved by the object of the tender procedure. The resulting positive impact on the partner system (section 1.1.1 of the assessment grid) should also be presented.

The contractor must undertake a critical examination of the ToRs (section 1.1.2 of the assessment grid), objectives, indicators and milestones listed in section 2.2 by:

- undertaking an assessment of the appropriateness of the personnel concept for implementing the scheduled tasks.
- providing an assessment of the results hypotheses for achieving the objectives and possible risks in implementation.
- assessing the cooperation structure with involved entities

3.2 Processes and actors in the partner system (section 1.2 of the assessment grid)

Processes describe actions or tasks necessary to render specific services in a sector or the cooperation/partner system. Specific actors are given responsibility for determining and implementing these actions and sets of tasks in line with the regulations. Actors are usually institutions such as ministries, local governments, associations and chambers, non-governmental organisations, companies in a sector or individual businesses, universities or banks, but may also be individuals (e.g. a person with higher decision-making authority).

The tenderer is required to describe, using existing documents where possible (see annexes), the processes in the sector or partner system that are relevant to the services put out to tender (section 1.2.1 of the assessment grid).

The tenderer is required to present the actors (partners and others) who are relevant for the tender, NASRI, NCPs, and QH stakeholders, in the form of a map of actors. As far as possible, it should list the actors by name. Their mandates, as well as strengths, weaknesses and interests with respect to the services put out to tender, are also to be briefly presented (section 1.2.2 of the assessment grid).

In addition, the tenderer is required to describe the interaction between the actors mentioned above. This can consist of describing the specific collaboration between individual actors in the processes listed above, of the dependencies or conflicts between the actors and their consequences or of existing dialogue and communication formats (section 1.2.3 of the assessment grid).

3.3 Strategy (section 1.3 of the assessment grid)

The strategy for delivering the services in the tender is the core element of the technical-methodological concept. It is composed of the following elements:

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- Procedure for achieving the objectives stated in section 2.2 of these ToRs
- Development of partnerships with the relevant actors
- Approaches for leverage effects and measures for scaling-up
- Consideration of environmental and social compatibility requirements (including gender equality)
- Appropriate consideration of further requirements

3.3.1 Strategic approach to achieving the objectives mentioned in the ToRs (section 1.3.1 of the assessment grid)

The tenderer is required to describe and justify the approach it plans to adopt to achieve the milestones, objectives and results (see section 2) for which it is responsible.

The tenderer is expected to describe the strategic approach to the tasks formulated in section 2 (i.e., not a description of activities) and the implementation strategy with a description of important activities or lines of action.

3.3.2 Building partnerships with the relevant actors (section 1.3.2 of the assessment grid)

The tenderer is required to develop and describe a strategy for developing the cooperation with the EU4I local experts, NASRI and ISOs from the QH stakeholder actors in the partner system who are relevant for the implementation of the services in the tender. The project partnerships already mentioned in section 1 must also be considered.

3.3.3 Approaches for leverage effects and measures for scaling-up (section 1.3.3 of the assessment grid)

The tenderer is required to state whether there are promising approaches for leverage effects beyond the measures mentioned in section 2 (for example through targeted measures in the field of 'knowledge management') and to describe them. In doing so, the tenderer is required to present and explain measures that promote both horizontal and vertical scaling-up. In particular, the tenderer must submit proposals on how innovations that have been developed in the context of implementation can be disseminated beyond the sphere of influence of the project.

3.3.4 Consideration of environmental and social compatibility requirements (section 1.3.4 of the assessment grid)

Gender equality

The tenderer is required to outline in the tender how it can prevent negative impacts on gender equality in its area of responsibility and how it can contribute to improving gender equality through corresponding measures (see also relevant requirements in section 2.5).

Environmental protection and climate action (climate change mitigation/adaptation)

The tenderer is required to outline in the tender how it can prevent negative impacts on the environment and the climate in its area of responsibility and, in addition, how it can contribute

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to improving the environmental and climate situation through corresponding measures (see also relevant requirements in section 2.5).

Conflict and context sensitivity

The tenderer is required to outline in the tender how it is planning its activities in the context of conflicts or violence and what specific measures it has adopted for conflict- and context-sensitive implementation (see also relevant requirements in section 2.5).

Human rights

The tenderer is required to outline in the tender how it can prevent negative impacts on the human rights situation in its area of responsibility and how it can contribute to improving the human rights situation through corresponding measures (see also relevant requirements in section 2.5).

Requirement: 'Gender equality':	8 points out of 10 (maximum)
Requirement: 'Environmental protection and climate action (climate change mitigation/adaptation)':	1 points out of 10 (maximum)
Requirement: 'Conflict and context sensitivity':	1 points out of 10 (maximum)

3.4 Project management
(section 1.4 of the assessment grid)

In this section, the tenderer presents the operational plan for implementing the services in the tender, describes the procedure for coordination with GIZ or the project and the project partners, and explains its backstopping strategy and the monitoring procedure.

3.4.1 Operational plan
(section 1.4.1 of the assessment grid)

The tenderer is required to draw up and explain an operational plan for implementing the strategy described in section 3.3, including a plan for the assignment of all the experts included in the tender. The operational plan must include the assignment times (periods and expert days) and assignment locations of the individual experts, the milestones as presented in section 2, and describe all the necessary work stages in detail and chronological order. The tenderer can define further milestones beyond those prescribed in section 2 and map them out in the plan of operations.

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3.4.2 Coordination with GIZ or the commissioning project
(section 1.4.2 of the assessment grid)

– Not applicable –.

3.4.3 Steering or coordination of measures with the relevant implementing partner
(section 1.4.3 of the assessment grid)

In the tender, the tenderer must name the implementing partners relevant for implementing the services and describe and explain the procedure for steering or coordinating the measures with them.

3.4.4 Monitoring
(section 1.4.4 of the assessment grid)

In the tender, the tenderer is required to describe how it can ensure that the requirements resulting from the monitoring system of the project, or the partner are met (see section 2). In doing so, the tenderer must describe how the relevant information is collected, in what form and at what intervals monitoring data are updated.

3.5 Further requirements
(section 1.5 of the assessment grid)

– Not applicable –.

4. Human resources

The tenderer is required to provide ‘experts’ for the positions referred to and described (scope of tasks and qualifications) in this section based on corresponding CVs. **The requirements for the format and content of the CVs are described in section 6.**

The qualifications mentioned below correspond to the requirements for achieving the highest number of points in the technical assessment.

‘One year of professional experience’ is therefore defined as a cumulative 12 expert months with at least 20 expert days per month, provided no diverging definition is specified for individual qualifications.

Expert 1: Team leader (section 2.1 of the assessment grid)

This position is a key expert. The Team Leader will be responsible for the coordination and management of the technical assistance and inputs provided to the EU4I and NASRI. A statement of availability for this expert must be attached to the tender as an annex.

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Tasks of expert 1: Team leader

- Overall responsibility for all the WPs in Section 2
- Develop a common work plan with the pool of experts, local experts, NASRI local experts and EU4I and align on targets and modes of communication.
- Coordinate and supervise the pool of experts in delivering the tasks of WP 1, 2 & 3 and implementation of WP 4.
- Ensuring the coherence and complementarity of the contractor’s services with other services delivered by the project at local and national level.
- Design, implementation, monitoring and evaluation of capacity development measures for local partners in the areas of research and innovation.
- Responsibility for considering cross-cutting themes (for example, gender equality)
- Staff management, identifying the need for short-term assignments within the available budget, planning and managing the assignments and supporting local and international experts.
- Represent the project at key project-relevant events and meetings.
- Monitor the progress of the project against the pre-determined and agreed-upon time work plans and report to EU4I possible deviations from the above-mentioned plans and schedules.
- Produce progress reports on a 3-monthly basis, interim progress reports and final progress reports in accordance with deadlines by obtaining inputs from local experts.
- Regular bi-monthly online meetings with EU4I and NASRI local experts
- Responsibility for checking the use of funds and financial planning in consultation with the officer responsible for the commission at GIZ.
- Supporting the officer responsible for the commission in updating and/or adapting the project strategy, in evaluations and in preparing a follow-on phase

Qualifications of expert 1: Team Leader

Education/training (section 2.1.1 of the assessment grid):	University degree (e.g. ‘master’s or German Diplom’) in International Development, Education Studies, Management, Business Administration or Engineering
Language (section 2.1.2 of the assessment grid):	Knowledge of English, C1-level in the Common European Framework of Reference for Languages
General professional experience (section 2.1.3 of the assessment grid):	7 years of professional experience in the sector field of Research and Innovation, including capacity building, R&D, management, stakeholder engagement and innovation sector
Specific professional experience (section 2.1.4 of the assessment grid):	7 years of professional experience in research and innovation and/or innovation sectors (4 out of possible 10 points); 7 years of experience in Research and Innovation projects/programs as an expert evaluator, national expert, and/or advisory role for projects in international development, R&D and innovation. (3 out of possible 10 points); 7 years of professional experience in

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	project writing and/or implementation of EU research projects (e.g., Erasmus +, Horizon 2020, Horizon Europe, Eureka) or participation in tender studies for the European Commission and other EU institutions and agencies (3 out of possible 10 points).
Leadership/management experience (section 2.1.5 of the assessment grid):	5 years of management experience in EU FPs, companies, or other organisations with disciplinary leadership responsibility for 10 people and additionally with annual budget responsibility for 500.000 EUR
International professional experience outside the country/region of assignment (section 2.1.6 of the assessment grid):	3 years of professional experience in a developing country outside the EU
Experience in the field of development cooperation (section 2.1.8 of the assessment grid):	5 years of experience in development cooperation projects
Other (section 2.1.9 of the assessment grid):	Experience and/or membership with European Research and Innovation associations/unions/technology platforms.

Expert 2: Pool 1 ‘Proposal Development and Writing’ with 3-6 experts (section 2.3 of the assessment grid)

In derogation from the number of experts mentioned above, **3 CVs** must be added to the tender. The ability of the tenderer to offer the pool of experts required here is assessed solely on the basis of these exemplary CVs.

The number of experts assigned from the pool may differ from those required in section 4 of the Terms of Reference. For experts not named in the tender, GIZ must confirm before the assignment that their qualifications are equivalent to those of the short-term experts proposed in the tender.

Tasks of the expert pool

- Overall responsibility for WP 1 and WP 2, which relates to finding the relevant open calls for application, international partners for consortia building, development of proposal ideas with the applicant institutions, proposal writing, and final revision of the proposal prior to the submission.
- Develop guidelines and instructional materials on the topics related to the proposal development phase until the phase of submission of the application.
- Regular online meetings and communications with the ISOs supported during the proposal development phase.

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- Travel to Albania 8 times for face-to-face meetings with the ISOs during proposal development phase on a demand basis.
- Regular bi-monthly meetings and communication with the EU4I team and NASRI local experts

Qualifications of the expert pool

Education/training (section 2.2.1 of the assessment grid):	All experts with a university degree (e.g. ‘master’s or German Diplom’) in Project Management, International Development, Education Studies, Management, Business Administration or Engineering
Language (section 2.2.2 of the assessment grid):	All experts with knowledge of English, C1-level in the Common European Framework of Reference for Languages
General professional experience (section 2.2.3 of the assessment grid):	All experts with 7 years of professional experience in research and innovation projects/programs, project design and implementation under EU FPs (Horizon 2020, EIT, EIC, Eureka and Horizon Europe) for institutions/organisations in the last 7 years.
Specific professional experience (section 2.2.4 of the assessment grid):	All experts with 5 years of professional experience in proposal development, project writing and/or management of EU research projects under EU FPs (Horizon 2020 and Horizon Europe) or tender projects/studies for the European Commission and other EU institutions and agencies (5 out of possible 10 points); All experts with 3 years of professional experience as an expert evaluator, national expert, and/or advisory role for projects in international development, R&D and innovation (5 out of possible 10 points)
International professional experience outside the country/region of assignment (section 2.2.6 of the assessment grid):	All experts with 1 year of professional experience in one country outside the country of assignment
Other (section 2.2.9 of the assessment grid):	3 experts with 3 years of experience in the delivery of consultancies in the field of financial and administrative/IPR and legal rules of EU FPs

Expert 3: Pool 2 ‘Training Module’ with 2-3 experts (section 2.3 of the assessment grid)

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In derogation from the number of experts mentioned above, **2 CVs** must be added to the tender. The ability of the tenderer to offer the pool of experts required here is assessed solely on the basis of these exemplary CVs.

Tasks of the expert pool

- Overall responsibility for delivering the training modules as per WP 3, which relates to the topics of Funding models of EU Framework Programs on Research and Innovation, Legal, Finance & IPR Issues, and customised training for the NCPs Network.
- Prepare training materials, guidelines, and handouts on the legal, finance, administration, and IPR aspects of proposal development.
- Provide instruction materials on topics related to proposal development and application submission to support the team of experts responsible for delivering WP2.
- Develop the training module with the NASRI experts and communicate regularly with the EU4I during the drafting of the training module until the final version.
- Travel to Albania one time to deliver the training in person.

Qualifications of the expert pool

Education/training (section 2.3.1 of the assessment grid):	2 experts with a university degree (e.g. 'master's or German Diplom') in Project Management, International Development, Education Studies, Management, Business Administration or Engineering
Language (section 2.3.2 of the assessment grid):	2 experts with knowledge of English, C1-level in the Common European Framework of Reference for Languages
General professional experience (section 2.3.3 of the assessment grid):	2 experts with 5 years of professional experience in the sector research and innovation projects/programs under EU FPs (Horizon 2020 and Horizon Europe) for institutions/organisations in the last 7 years.
Specific professional experience (section 2.3.4 of the assessment grid):	2 experts with 5 years of professional experience in the delivery of training sessions/workshops in the field of financial administrative, legal and IPR rules
International professional experience outside the country/region of assignment (section 2.3.6 of the assessment grid):	2 experts with 1 year of professional experience in one country outside the country of assignment
Other (section 2.3.9 of the assessment grid):	2 experts with experience as trainers on EU FPs Research and Innovation Program; Proposal Writing topic; Legal, Finance & IPR Issues

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UN DESA regions are defined as East Africa, Central Africa, North Africa, Southern Africa, West Africa, South America, the Caribbean, Central America, North America, Central Asia, East Asia, South Asia, Southeast Asia, West Asia/Middle East, Eastern Europe, Northern Europe, Southern Europe, Western Europe, Australia, Melanesia, Micronesia and Polynesia; refer to USND methodology for country assignment.

The tenderer must assign all the proposed experts to the required qualifications and clearly present them in a separate table preceding the CVs. The summary presentation must mention only qualifications that are indicated in the CVs. Meaningful references in the CVs must evidence professional experience. It is advisable to make explicit reference to each example of professional experience.

Soft skills of team members

In addition to their specialist qualifications, all team members are also expected to have the following qualifications:

- Team skills
- Initiative
- Communication skills
- Sociocultural and intercultural skills
- Efficient partner- and client-oriented working methods
- Interdisciplinary thinking

Soft skills are not evaluated.

5. Costing requirements

5.1 Assignment of experts

In your tender, please do not deviate from the specification of quantities required in these ToRs (the number of experts and expert days, the budget specified in the price schedule). This is part of the competitive tender and is used to ensure that the tenders can be compared objectively. Please note only services that were commissioned by GIZ and rendered by the contractor will be remunerated. We would also like to point out that it may not be necessary to make use of the total number of proposed expert days.

The number of expert days corresponds to full working days.

Expert	Expert days in the country of residence/Remote	Availability of expert in the country of assignment* in expert days	Expert days in total	Consecutive stay > 3 months (see General Terms and Conditions)	Number of international flights	Number of national flights
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				2020, section 3.3.2)		
Expert 1: Team Leader	40	19	59	No	6 (return flights)	0
Expert Pool 1: Proposal Development and Writing (6 experts)	135	30	165	No	8 (return flights)	0
Expert Pool 2: Training Module (2 experts)	14	6	20	No	2 (return flights)	0

5.2 National administrative staff

– Not applicable –

5.3 Travel expenses

5.3.1 Travel – sustainability considerations

GIZ would like to reduce greenhouse gas emissions (CO₂ emissions) caused by travel. When preparing your tender, please incorporate options for reducing emissions, such as selecting the lowest-emission booking class (economy) or using means of transport, airlines and flight routes that are more CO₂-efficient. Travelling by train (second class) or e-mobility are the preferred options for short distances.

CO₂ emissions caused by air travel should be offset if they cannot be avoided. GIZ specifies a budget for this, enabling carbon offsets to be settled against evidence.

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There are many different providers in the market for emissions certificates, and they have different climate impact ambitions. The [Development and Climate Alliance](#) has published a [list of standards](#) (only in available only in German commends using the standards specified there).

5.3.2 Travel Expense Requirements

The travel expenses must be costed as follows by the contractor:

Travel expenses item	Number/quantity/budget
Total number of international flights	16 return flights
CO ₂ offsets for flights	1600 EUR An unalterable budget for CO ₂ offsets for settlement against evidence is specified.
Transport costs (rail travel, car travel, public transport)	5,000 EUR
Per-diem allowances	55 days X 27 EUR = 1,485.00 EUR
Accommodation allowances	68 nights
Other travel expenses (visa, project-related travel expenses outside the place of business, etc.)	500

Per-diem is reimbursed as a lump sum up to the maximum amounts permissible under tax law for each country as set out in the country table in the circular from the German Federal Ministry of Finance on travel expense remuneration (download at <https://www.bundesfinanzministerium.de>).

In addition, for the following items, reasonable costs can be settled against evidence up to the proposed amount.

- Costs of overnight accommodation
- Flight costs
- Transport costs
- Other travel expenses

All travel activities must be agreed in advance with the officer responsible for the project. Travel expenses must be kept as low as possible.

Please note: These travel expense items do not cover costs related to the contract in the country of assignment (see section 3.3.2 of the General Terms and Conditions). Please cost these items if applicable in the price schedule under '2.2 Costs related to the contract in the country of assignment'.

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5.4 Equipment

– Not applicable –

5.5 Operating costs in the country of assignment

– Not applicable –

5.6 Workshops, education and training

The contractor runs the following training courses, after receiving prior approval from EU4I:

- 6-days of training with representatives of the QH stakeholders on specific topics with a maximum of 50 participants, out of which at least 30% are women, taking place in Tirana. The contractor will conduct the one-time training for 6 (six) days, in one consecutive session for up to 50 participants. The participants are ISOs, NCPs and other QH stakeholders. The training will take place in Tirana and will be video-recorded by NASRI and shared with all related parties via the NASRI website. NASRI and EU4I will select the participants.

The logistics, such as venue/catering and workshop-related costs, will be covered by the EU4I. The contractor is not responsible for the logistical organisation of the training and therefore the costs do not need to be specified.

5.7 Local contributions

– Not applicable –

5.8 Other costs

– Not applicable –

5.9 Flexible remuneration item

Budget for flexible remuneration: EUR 30,000

The fixed, unalterable budget above is earmarked in the price schedule for flexible remuneration. Flexible remuneration is intended to facilitate the flexible management of the contract by the officer responsible for the commission at GIZ. The contractor can make use of the funds in accordance with section 3.3.5.7 of the General Terms and Conditions.

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6. Requirements on the format of the tender

The structure of the tender must correspond with the structure of the ToRs. It must be legible (for example Arial, font size 11 or larger) and clearly formulated. The tender must be written in English.

The technical-methodological concept of the tender (section 3 of the ToRs) must not exceed 10 pages (not including the cover page, list of abbreviations, table of contents, brief introduction and CV for the back stopper). Additional annexes not requested will not be assessed.

The CVs of the staff proposed in accordance with section 4 of the ToRs must be in the EU format and not more than four pages in length. The CVs can also be submitted in English.

The CVs must clearly and unequivocally show what position the proposed person held, which tasks they performed and how long they worked during which period in the specified references. **The references contained in the CVs must therefore include the following information:**

- Name of the company/organisation/reference project in which the expert worked.
- Position held and task(s) performed by the expert in the company/organisation/reference project.
- Work outcomes or products produced by the expert, or expert's contribution to the completion of these outcomes and projects (if relevant)
- Duration of the expert's assignment in the company/organisation/reference project per calendar year in full-time expert days, weeks or months (for example: 2019: 2 months, 2020: 10 months, 2021: 1 month)
- Leadership experience/management: clear information on the reference projects or fixed positions within the company/organisation in which the requirements specified in section 4 were fulfilled (for example, period, number of persons for whom the expert had disciplinary responsibility, project budget) (if relevant)
- International professional experience/professional experience in the country of assignment: clear information on the reference projects or fixed positions in the company/organisation in which the requirements specified in section 4 were fulfilled (for example, actual duration of assignment on the ground in full-time expert days, weeks or months) (if relevant)

In order to facilitate the assessment, we request that you number the references sequentially and provide only references that are clearly related to the object of this tender.

7. Options

7.1 Follow-on measure/extension of service-delivery period

It is possible to continue key elements of the service put out to tender as part of a follow-on measure within the context of the basic project. This is described in detail below.

Type and scope:

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Continuation of the activities described in section 2 of these ToRs with possible expansion of these activities to include new work packages of the same type. Within the framework of the available financing, the number of expert days and the budget specified in section 5 of these ToRs are increased in proportion to the additional activities that are now required.

Precondition: Market demand and success rate of the services described in these ToRs exceed expectations. To be assessed and decided by GIZ.

8. Annexes Module proposal

- Overview of the EU4I support scheme set-up to support the ISOs in Albania. Alimehmeti, G. (2023) "The Research and Development Landscape in Albania – Perspectives of HEI to Participate in the Horizon Europe Programme", GIZ Albania.
- Communication and Visibility Plan of the EU