

Terms of Reference

Drafting of ERA Reports for the Western Balkans (Albania, Bosnia and Herzegovina, Kosovo*, North Macedonia)

Title	Drafting of ERA Reports for the Western Balkans (ALB, B&H, KOS, NMK)
Application Deadline	24 September 2023
Reference	POLICY ANSWERS
Contacts	Project lead, contact for this agreement: Malte Schrage-Veltins (Malte.Schrage-Veltins@dlr.de)

1 Introduction and Background

POLICY ANSWERS (short for: R&I POLICY making, implementation AND Support in the WEsteRn BalkanS) is a project funded by the European Union's Horizon Europe research and innovation programme under grant agreement No 101058873.

The project supports policy coordination in the Western Balkans and with the European Commission (EC) and the European Union (EU). 14 partner organisations, representing network nodes in the region and EU expert organisations, foster policy dialogue through formal meetings (such as Ministerial, Steering Platform and ad-hoc policy meetings), undertake monitoring for agenda setting, support capacity building, implementation of the EU's Western Balkan Agenda and the alignment of thematic priorities. The project implements regional pilot activities and offers an information hub based on the online information platform "westernbalkans-infohub.eu". The partners provide analytical evidence via mapping activities of the stakeholder ecosystem, monitoring of the implementation of the Western Balkans Agenda and of the Western Balkans' integration into the European Research Area (ERA) as well as via strategic foresight.

POLICY ANSWERS also allows for tailored and targeted capacity building activities in the Western Balkans (WB) as well as regional alignment of priorities in relation to the digital transformation, the green agenda and towards healthy societies. Pilot activities provide learning opportunities on policy and programme level and reach out to final beneficiaries related to improved academia-industry cooperation, researchers' mobility, inclusion of youth in policy processes, promotion of research infrastructures and increased innovation skills in all areas.

* This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence.

The project task entitled “Drafting ERA Reports of the Western Balkans” is placed in the frame of the targeted mapping and monitoring activities (Work Package 2 of the project; Task 2.3) and being coordinated by the Project Management Agency of the German Aerospace Center (DLR).

Task 2.3 shall provide an assessment and analysis of the status quo of the R&I systems of the WB economies and monitors their progress towards ERA integration. The results of the analysis will be summarised in respective ERA Reports for the four Western Balkan economies: Albania, Bosnia and Herzegovina, Kosovo and North Macedonia. ERA Reports for Montenegro and Serbia will not be covered by POLICY ANSWERS but by a different organisation. The reports will be based on a template, approved by the EC, which includes the four ERA Priority Areas of the current EC ERA Communication¹:

1. Deepening a truly functional internal market for knowledge;
2. Taking up together the challenges posed by the twin green and digital transition and increasing society’s participation in the ERA;
3. Enhancing access to research and innovation excellence and enhancing interconnections between innovation ecosystems across the EU;
4. Advancing concerted research and innovation investments and reforms.

The template provides the framework and instructions for drafting the ERA Reports including reporting on the progress made in the four above-mentioned ERA priorities and - if possible - on the implementation of the ERA Policy Agenda² and on the ERA actions a WB economy has committed to. The ERA Reports will be shared with EC services, further publication will be decided with the EC.

Detailed information about the activities of POLICY ANSWERS is available at the following website www.westernbalkans-infohub.eu.

Upon award of the service contract, the contracting institution will share further information.

2 Description of the Scope and Purpose of the Service

This call requests the provision of the following services for drafting the ERA Reports for

Lot 1: Albania,

Lot 2: Bosnia and Herzegovina,

Lot 3: Kosovo,

Lot 4: North Macedonia.

¹ European Commission (2020). European Research Area (ERA), https://research-and-innovation.ec.europa.eu/strategy/strategy-2020-2024/our-digital-future/european-research-area_en.

² European Commission (2021). ERA Policy Agenda, https://commission.europa.eu/system/files/2021-11/ec_rtd_era-policy-agenda-2021.pdf.

The following work shall be carried out for each of the reports respectively:
One ERA Report for each of the four WB economies (Albania, Bosnia and Herzegovina, Kosovo and North Macedonia) will be drafted consisting of approximately 5 to 8 pages by monitoring and analysing the progress made by the respective WB economy in its integration into the new ERA. The deadline for the submission of the first draft ERA Report is 5 November 2023, followed by a review and editing period. The service provider will be supported during the drafting process by the project partners of T2.3 (DLR and WB partners). After their finalisation, the ERA Reports will be submitted to the EC by the project lead (DLR).

In concrete terms, the following services shall be implemented:
Selected service providers with proven expertise in the area of R&I policy and administration in the respective WB economies should support the activities of POLICY ANSWERS for the following major task:

- Development of the ERA Report of the respective WB economy (ALB, B&H, KOS, NMK) aligned to the template approved by the EC. The deadline to submit the draft is 5 November 2023.

The following work needs to be done within the drafting process:

- Analysis and monitoring of the concerned aspects of the respective WB economy in their efforts towards ERA integration (e.g. participation in ERA Policy Agenda respectively commitment to ERA Actions, ERA Priority Areas)
- Background/desk research using available data sources and existing national and regional strategy documents and reports on R&I development;
- Data collection and analysis;
- Integration of comments by the POLICY ANSWERS team and the EC into the draft ERA Reports;
- Participate in coordination meetings to continuously exchange regarding the development of the draft of the ERA Reports.

Implementation period, expected deadlines and tentative timeline

The overall implementation period for the Western Balkans ERA Profiles is October 2023 to December 2023.

Requested outputs and deliverables

Work plan to be agreed	October 2023
Submission of the draft ERA Report for the WB economy (5-8 pages) to DLR for quality check	5 November 2023
Review period of respective ERA Report (integration of DLR/WB partners/EC) comments)	November to December 2023
Submission to EC	December 2023

Language

The ERA Reports have to be drafted in English language. Working language within the POLICY ANSWERS team is English. Desk research for the WB economy's

respective ERA Report needs to be done mainly in the corresponding language - depending on availability.

Quality Assurance

The service provider shall perform the service with reasonable care and skills (see below). DLR/POLICY ANSWERS will perform quality assurance and provide comments that need to be included into the drafts before submission to the EC. The EC will also provide comments.

Funding and Reimbursement

The maximum budget for the above described task to be delivered is 1,000.00 EURO for a single report. This maximum budget includes the service fee and other costs as well as VAT and any other taxes and duties.

This service will be funded by the POLICY ANSWERS project³.

3 Application, selection and contracting procedure

Required qualification/skills/experiences of the Service Provider

The service provider needs to provide his expertise and enclose a CV to the application demonstrating:

- Education: Master's degree in fields relevant for the assignment.
- Experience: Minimum of 5 years of vocational experience with a connection to research and innovation of the WB. Experience with similar reports and studies and research and innovation policies. Proven knowledge of the region, experience in working with stakeholders in the WB, experience in working with the EC is an advantage.
- Have a thorough understanding of local research and innovation systems and experience with European and international R&I cooperation.
- If possible have expertise in statistics and research and innovation policy and/or be in contact with the respective authorities.
- Language requirements: Excellent English written and spoken. Knowledge of the language of the respective WB economy for the ERA Report is needed.

Application

The application from the Service Provider shall include the following documents:

- Price (with a rough budget breakdown for the work to be done over the next months and the draft to be submitted)
- Skills: CV
- Optional: recommendations and references (documented positive feedback in relation to previous studies/reports are considered an advantage)

Submission of application

Please submit the required documents for the application per e-mail (clearly stating for which Lot or Lots / which of the economies the expert applies) to:

³ www.westernbalkans-infohub.eu

Deutsches Zentrum für Luft- und Raumfahrt - Projektträger, Germany
c/o Malte Schrage-Veltins
Malte.Schrage-Veltins@dlr.de

Deadline for the submission of an application referencing to this ToR is **24 September 2023, 23:59 CET (date of entry of the e-mail)**.

Selection

The best value for price principle will be applied, thus the following criteria will be taken into account:

- Price
- Skills
- Experiences with project management/EC projects

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.

Contracting procedure for Service Provider

The selected expert will be informed until 4 October 2023 on the result of the selection procedure. The contract with the Service Provider will be established immediately after the selection for the drafting of the respective ERA Report. The payment will be made after the submission of the respective ERA Report to the EC.