



# HANDBOOK ON HOW TO USE EU RECOVERY PLANS & ERDF REGIONAL FUNDS FOR THE SUSTAINABILITY OF TOURISM IN THE MEDITERRANEAN

Terms of Reference

INTERREG MED SUSTAINABLE TOURISM COMMUNITY

Issue date: **16<sup>th</sup> of September 2021**

Closing date: **11<sup>th</sup> of October 2021**

Author: **NECSTouR**



## Summary table

Introduction.....	3
General Context.....	3
Aim of this mission .....	4
How to reply to this tender .....	5
Profile of the tenderers .....	5
Methodology .....	5
Timeline and Deliverables .....	6
Foreseen Activities .....	6
How to apply .....	7
Selection process.....	7
Award criteria.....	7
Contractual and financial terms .....	8
Administrative details of the Contracting Authority .....	8
Budget .....	8
Contracting and payment.....	8
Awarding .....	9
Formalisation of the Contract .....	9
Format .....	9
Intellectual property.....	9
Confidentiality Clause.....	9



## Introduction

**NECSTouR**, the network of European Regions for sustainable and competitive tourism is the partner of [the INTERREG MED Sustainable Tourism Community](#) (STC), leading the capitalisation work package (WP).

Besides this mission, NECSTouR is engaging its members - regional tourism authorities – to finance the recovery and regeneration of the tourism sector towards the so called “tourism of tomorrow” meaning greener, digital, and more resilient. This is at the core of the network’s programme, which entitles mainstreaming the EU financial instruments available to support the tourism “*twin transition: greening and digital*”, since the EU Green Deal and Digital Age strategies were published.

The Sustainable Tourism Community is the INTERREG MED horizontal project<sup>1</sup> responsible for studying, testing, capitalising innovative instruments and actions towards the enhancement of tourism sustainability in the Mediterranean through the community of [30 modular projects](#) gathering 200+ organisations. All the projects belong to the MED programme’s priority axis 3 “*Natural & Cultural resources – Protecting and promoting Mediterranean natural and cultural resources*” and to the specific objective 3.1 “*To enhance the development of sustainable policies for more efficient valorisation of natural resources and cultural heritage in coastal and adjacent maritime areas of a sustainable and responsible coastal and maritime tourism in the MED Area*”.

- More information about [the INTERREG MED Sustainable Tourism Community](#).

One important aspect of the STC partnership to consider is **the geographical distribution of the partners within the MED area**. Each partner is responsible for one territorial antenna. NECSTouR is acting for example as the EU-based antenna of the partnership and another partner is following actions in the southern coast of the MED. The handbook however should focus on the other antennas, divided by country (Spain/Portugal, Italy/Malta, France, Greece/Cyprus, Slovenia/Croatia, Croatia/Bosnia-Herzegovina/Montenegro/Albania). More information about the distribution will be provided to the tenderer.

## General Context

The economic crisis caused by the COVID-19 outbreak have affected the European tourism sector more than any other industry while the Mediterranean countries and their regions are the most affected ones.

Tourism is at the top of the European discussions and in the lack of a dedicated tourism budget line across the [Multiannual Financial Framework 2021-2027](#), Regions and Member States must target tourism investments through the financial instruments manage by regional authorities. Yet, the sector

<sup>1</sup> [More information about horizontal projects](#).



and its governance can benefit from the package Next Generation EU<sup>2</sup> and Cohesion Instruments, and more tangibly the ERDF policy objectives and specifically the objective 4 “A more social Europe” where tourism is explicitly quoted.

- [More information about Next Generation EU and recovery plans.](#)

NECSTouR and [the STC partners](#) have contacted their respective managing authorities to flag tourism in the **national recovery plans** (the Recovery and Resilience Facility (RRF) and REACT EU) while keeping promoting the need and the unique chance to mainstream sustainable tourism investments in the **regional operational programmes and ERDF**.

As such, the Sustainable Tourism Community requires expertise to identify these new opportunities in policies and financial instruments to keep mainstreaming the modular projects’ outcomes and policy recommendations in the context of the Mediterranean tourism recovery and transition to sustainability, digitalisation, and resilience.

## Aim of this mission

**NECSTouR**, on behalf of the INTERREG MED Sustainable Tourism Community, **is looking for specialised consultants with whom to subcontract the mission** of elaborating a “HANDBOOK ON HOW TO USE EU RECOVERY PLANS & ERDF REGIONAL FUNDS FOR THE SUSTAINABILITY OF TOURISM IN THE MEDITERRANEAN”.

The goal is to provide the community with a deep overview of the opportunities to finance sustainable tourism measures, invest in the tourism of tomorrow (green, digital, social, resilience) through both the ERDF and the national recovery and resilience plans in the countries eligible to the MED programme<sup>3</sup>.

For this purpose, the contractor will be asked to produce:

1. Analysis of how tourism is embedded in ERDF Regulations 2021-2027 (both National Partnership Agreements and Interreg MED European Territorial Cooperation Programme)
2. A harmonised analysis of the latest tourism investments foreseen in the Operational Programmes related to the ERDF 2021-2027. And particularly, where tourism is included (directly or indirectly) in the national recovery and resilience plans and where the regional authorities are involved.
3. Policy recommendations to ERDF Managing Authorities and national, regional, and local authorities or other tourism stakeholders on how to integrate solutions to accelerate the tourism transition to sustainability in their programmes.

<sup>2</sup> [The Next Generation EU](#) is the recovery package of 750€ billion which includes among other the instruments “Recovery and Resilience Facility” and “REACT EU” which will be managed by the Member States of the EU and regions respectively.

<sup>3</sup> [Countries in the MED cooperation area](#): Portugal, Spain, France, Italy, Malta, Slovenia, Croatia, Greece and Cyprus



The content of this handbook will substantially support the STC partners and the community's work to be ready when the calls for projects will be launched in 2022 to maximise the use of our community ensuring capitalisation, mainstreaming and longer-term funding securing.

## How to reply to this tender

The contractor needs to offer a methodology taking fully into account the context and objectives of this mission described earlier.

Tenderers willing to apply must deliver a project proposal including a targeted methodology, the activities roll out leading to outputs and deliverables, the applicable budget and the profiles and CVs which guarantee the expertise of the dedicated team.

Tenderers must prove sound experience in policy-based research in regional tourism and EU funding mechanisms.

### Profile of the tenderers

An experienced consultant (self-employed individual or company) specialised in Sustainable Tourism Policy is needed to deliver the "HANDBOOK FOR SUSTAINABLE MEDITERRANEAN TOURISM THROUGH THE EU RECOVERY AND LONGER-TERM REGIONAL FUNDING"

The profile of the applicants must comply with the following criteria:

- Expertise in tourism planning and policy making at European and Mediterranean basin level
- Experience and capacity in drawing technical and recommendations reports, policy roadmaps
- Expertise in advocacy at European, national, and regional level
- Knowledge and skills in the mainstreaming mechanism of the Interreg programme
- Knowledge of the characteristics of sustainable tourism in the Mediterranean area

### Methodology

The bidder will present a methodological proposal, which will contain the stages of work to carry out this mission, as well as a schedule of tasks (with timing of the elements to be delivered and the planned meetings and work sessions).

The handbook must include:

1. A harmonised analysis of the different MED countries in terms of the state of art of tourism investments foreseen/applicable in the following financial instruments:



- **ERDF related Operational Programmes:** List of regions including tourism in their operational programmes and details on their ERDF (policy instruments, type of foreseen projects and beneficiaries)
  - **REACT EU:** A list of regions intending/confirming such tourism investments will be possible and how
  - **The national recovery and resilience plans:** List of country recovery plans including tourism following the example of analysis made by NECSTouR.
  - **Smart Specialisation Strategies for Sustainability (S4)<sup>4</sup>:** List of regions intending to or confirming they will add tourism in their S4 industrial strategy
2. Policy recommendations for MED Managing Authorities and national, regional, and local authorities or other tourism stakeholders on how to integrate solutions to change their approach on tourism funding or accelerate the tourism transition to sustainability in their programmes.
  3. A scheme describing the process of how those programmes will be channelled into projects, who the managing authorities are, which procedures (calls for projects etc) and expected beneficiaries and recommendations to tourism stakeholders to access to those.

## Timeline and Deliverables

1. Online Kick-Off Meeting in October with the winning bidder and representatives of the Sustainable Tourism Community to present the Methodology
2. Intermediary study to be delivered by the end of February 2022, including a list and description of policy recommendations identified and the list of the calls on recovery funds released or be released soon. The intermediary study will be revised with STC partnership.
3. Final deliverable to be submitted by the end of April 2022.
4. Presentation of the handbook during the Sustainable Tourism Brussels Conference [date tbd<sup>5</sup>]

## Documents to be submitted as final deliverable

- The Handbook layout edited and ready for print and distribution.
- PPT-based report that can be used in print and presentation to inspire stakeholders (Interreg MED and NECSTouR members)

## Foreseen Activities

The tenderer must include methodology for additional activities related to STC activities

- **Desk research** necessary to deliver the overview per MED country as stated in the introduction

<sup>4</sup> [Information about S4](#)

<sup>5</sup> Decision pending on the extension of the project



- Secure and perform **qualitative Interviews** to Managing Authorities and Tourism policy makers based on mapping previously made by our “country antennas”
- Draft **policy recommendations** in collaboration of STC partners and some community members/experts. Target audience: ERDF Managing Authorities; national, regional, and local authorities; other tourism stakeholders
- Provide methodology to contribute to some of the transferring workshops and/or regional capitalisation debates<sup>6</sup> through the organisation of **focus groups** [number to be determined with the partnership, ideally 1 per MED antenna<sup>7</sup>]
- **Present the results of the handbook during the Brussels conference** of the community (postponed to 2022) and/or the Barcelona Convention (in June 2022), and during strategic meetings with key policy makers and managing authorities to be identified by the STC partnership with the support of the contractor.

## How to apply

Applications must be submitted no later than **Monday the 11<sup>th</sup> of October at 12.00 CET** to [thomas.guillot@necstour.eu](mailto:thomas.guillot@necstour.eu)

The successful candidate will be notified by email on Friday the 15<sup>th</sup> of October 2021.

## Selection process

The selection of the specialist (individual consultant/expert or consultancy firm represented by a key expert) will be based on the evaluation of the technical and financial offer.

- Evaluation of methodological approach, maximum 30 points.
- Evaluation of the experience of the consultant or consultancy firm/organisation and/or of the specific CV(s) of the expert(s) involved. Maximum 40 points.
- Evaluation of the economic offer, maximum 30 points.

The offer gathering the maximum score will be selected.

## Award criteria

NECSTouR, as a contracting body, will proceed to examine the documentation provided to verify compliance with the technical and economic requirements of the bids, and may request from the tenderer any additional documentation required.

The contracting authority shall exclude from the evaluation and proposal of award the bids that do not comply with the requirements of the contract. Following the examination of the proposals, and after

<sup>6</sup> Online or on-site

<sup>7</sup> Six MED antennas: Spain/Portugal, Italy/Malta, France, Greece/Cyprus, Slovenia/Croatia, Croatia/Bosnia-Herzegovina/Montenegro/Albania.



a detailed assessment of the selected offer, a team -which composition shall be determined internally- will formulate the corresponding final proposal of award. In the event of observing omissions or deficiencies in the documentation provided, the applicable legislation for the correction of defects and omissions in documentation will apply.

The presentation of the certifications accrediting the fulfilment of the tax and social security obligations by the tenderer will be mandatory.

## Contractual and financial terms

### Administrative details of the Contracting Authority

NECSTouR Permanent Secretariat  
Rond-Point Schuman 14  
1050 Brussels  
BELGIUM

VAT NUMBER: BE 0812309870

### Budget

The Sustainable Tourism Community can commit through NECSTouR for a budget up to **30.000 EUR without VAT** to subcontract this mission.

According to the Interreg MED procedures, the sub-contractor needs to keep in mind in its proposal that the following activities should also be allocated under this total budget: control of expenditure borne by NECSTouR and its First Level Controller, sub-contracted management and communication activities, organisation of events and project meetings related to this mission, travel and accommodation of experts, speakers, stakeholders and possible associated partners.

### Contracting and payment

The acceptance of the offer of the successful tender implies the acceptance of the conditions and schedules detailed in these Terms of References. The payment term for the invoice will be made by bank transfer (bank account details will be asked).

For this work NECSTouR will be responsible for paying VAT in Belgium, therefore, the fees to be charged by the consultant will be submitted net of VAT.

NECSTouR maintains the right to require additional fiscal documentation if considered needed. The tax legislation in force at the date of acceptance of the offer will be applied.

Please refer to the rules of Public Procurement in the Interreg Med Programme Manual<sup>8</sup>.

<sup>8</sup> [Factsheet on public procurement in the Interreg MED Programme Manual](#)





## Awarding

NECSTouR, the contracting authority shall award the contract to the most economically and technically advantageous proposal, with a maximum date of 15<sup>th</sup> of October 2021. The award will be final.

## Formalisation of the Contract

The contract must be formalised in writing within a period of ten working days, from the following to the notification of the award (15<sup>th</sup> of October 2021).

## Format

The working language and publication of all the generated documentation will be English<sup>9</sup>.

The edition and layout of the Handbook must follow the style and image of the Sustainable Tourism Community.

## Intellectual property

The ownership of the work covered by the contract related to these Terms of Reference and co-funded by the Interreg MED Programme is open to the public and free of rights. The deliverables and results of the project should be accessible and available for free to the general public in a usable format. The Managing Authority/Joint Secretariat and any other relevant Programme stakeholder can use those for information and communication purposes. The authorship of the work covered by the contract related to these Terms of Reference is co-shared between the author and all the partners of the community.

## Confidentiality Clause

Despite the public availability of the results, part of the information exchanged for the development of this mission between NECSTouR, the INTERREG MED Sustainable Tourism Community and the selected specialist, may be confidential. On this basis, only the documents and other pieces of information provided explicitly with the statement “confidential” will be dealt with as such. The selected expert ensures that respect its confidentiality and do not disseminate it, forward it to third parties or use it without prior written consent from NECSTouR and the INTERREG MED Sustainable Tourism Community.

<sup>9</sup> The final handbook may be partially or totally translated in some of the languages of the Med area. An additional tender will be issued.