Call for OFFERS

for external experts supporting Interreg Europe project: PE4Trans

## Purpose of the call for offers

Selection of experts providing support the process of policy learning in Interreg Europe Project “Public Engagement for Sustainable Public Transport” (Acronym: PE4Trans), called hereinafter: PE4Trans. Support of 2 experts are planned:

* 1 expert on local transportation system analyses and planning and the carbon footprint calculation for the improved policy interventions,
* 1 expert on behavioural sciences integrating psychological and sociological knowledge for design of solutions effectively influencing people behaviour for environmentally desirable.

Their role will be to bring insights of state of the art from their respective domains of expertise and contribute to the policy learning process with assistance in diagnosis of current mobility behaviours in the 5 partner regions, provision of facts needed for policy instrument development and decision as well as evaluation and recommendations to actions planned in each of the 5 partner regions.

Experts may apply individually for a selected assignment or jointly. Offers can be made both by legal or natural persons.

## About the project

PE4Trans main objective is to improve the regional policies promoting sustainable mobility solutions to reduce significantly the carbon footprint and to make them more effective through public engagement in the design and implementation and use of behavioural economics findings. P4Trans partners adopt the approach “for the people, by the people and with the people” as a guiding principle for the possible policy improvements, which go in two directions:

* Influencing the citizens’ behavioural change using knowledge and good practices of policy solutions based on economy, sociology and psychology developments to stimulate people towards more sustainable routines and habits,
* Launching in the participating territories transferable mechanisms of public engagement in policy makings processes.

PE4Trans will focus on improvements in the policy instrument governance in 5 participating territories:

1. Kalisz-Ostrów Aglomeratom, PL,
2. Westmidlands, UK,
3. Central Macedonia Region, GR,
4. City of Valladolid, ES,
5. Weser Ems, DE.

The project will develop, in participatory approach, concrete policy solutions in each partner territory enhancing the use of sustainable mobility solutions and contributing to substantial reduction of the carbon footprint.

More information: <https://www.interregeurope.eu/PE4Trans/>

## Form of the contract

The offer sent following the template in Annex I will constitute the binding compromise between Adam Mickiewicz University Foundation, Poznan Science and Technology Park (PSTP) – the Lead Partner of the PE4Trans project - and the offering expert(s) of the work to be done as it is described in the section “SUBJECT OF THE CONTRACT AND WORK REQUIRED” below.

## The price

Following the template included in Annex I, the offer should calculate the price for:

**Assignment 1:** Expert on local transportation system analyses and planning and the carbon footprint calculation for the improved policy interventions

17 working days (indicating unit price) and 2 travels for 2 day workshops (indicating lump sum covering all expert expenses related to travel and accommodation per 1 travel), as indicated below:

1. Interregional workshop – presentation of diagnosis and facts for policy making and guidance for partners to prepare regional stakeholder workshops, September 2019, Thessaloniki (Greece). Indicative date to be confirmed: 19-20 September 2019;
2. Regional Action Plans – feedback sessions, January 2021, Kalisz (Poland)

Dates and places of workshops are indicative, may be changed, subject to decision of the project partnership.

**Assignment 2:** Expert on behavioural sciences integrating psychological and sociological knowledge for design of solutions effectively influencing people behaviour for environmentally desirable

21 working days (indicating unit price) and 3 travels for 2 day workshops (indicating lump sum covering all expert expenses related to travel and accommodation per 1 travel), as indicated below:

1. Interregional workshop – presentation of diagnosis and facts for policy making and guidance for partners to prepare regional stakeholder workshops, September 2019, Thessaloniki (Greece). Indicative date to be confirmed: 19-20 September 2019;
2. Workshop “How to change the citizen behaviours and habits”, Valladolid (Spain), February 2020,
3. Regional Action Plans – feedback sessions, January 2021, Kalisz (Poland)

Dates and places of workshops are indicative, may be changed, subject to decision of the project partnership.

**Deadline for submission the offers:**

25th of February 2019 at 24:00 CET to the e-mail: mp@ppnt.poznan.pl

**Timeframe for completion:**

From February 2019 to January 2021

## Subject of the contract and work required

The experts will provide insight in the policy learning process as well advice to assure that the outcomes of the project are in line with state of the art knowledge on optimising public transport solutions for carbon footprint reductions as well as social and psychological knowledge on influencing people’s behaviour. The experts are expected to collaborate with each other and with the project partners through the Purchaser. In particular, the experts will carry out the following tasks:

#### Task 1. Methodology and tools for diagnosis

The experts will provide a draft written methodology and questionnaire for “participatory diagnosis” of mobility diagnosis concerning frequent routes and types: commuting, leisure, tourism, shopping etc., the motivations related with the mobility behaviour and impact on carbon footprint. “Participatory diagnosis” will involve the stakeholders, especially citizens, in each of participating regions in acquisition of respondents to the questionnaire (preferable simple on-line survey). It will also involve the stakeholders in drawing final conclusion form the diagnosis. The diagnosis will aim to answer of question of “Which people’s mobility behaviours in the 5 participating regions have the highest potential for change in the view of transport policy instrument reach and impact on carbon footprint reduction”.

Deadline for provision of draft methodology and questionnaire: 20 March 2019

Deadline for provision of final methodology and questionnaire: 1 April 2019

**Assignment 1:** Carbon footprint in transportation expert – contribution to the questionnaire and methodology with the needs to make a diagnosis from the carbon footprint reduction point of view.

**Assignment 2:** Behavioural change expert – contribution to the questionnaire and methodology with the needs to make a diagnosis from mobility behaviour change point of view.

#### Task 2. Diagnosis report on transport behaviours in each territory and related carbon impact facts

The experts (expert on carbon footprint, expert on behavioural sciences) collaborating with PSTP will analyse the survey results with a view to map the transport behaviours in each territory. Experts carry out desk research to prepare facts regarding the impact of mapped behaviours on carbon footprint for decision making. This will help to design policy improvements based on prioritising the transport practices to be influenced through policy instruments. The catalogue of behavioural practices for each territory is elaborated by experts in collaboration with respective PPs to feed the 3rd territorial workshop accompanied by relevant facts to assist decision making process.

Deadline for provision 5 territorial reports mapping behavioural practices accompanied by relevant facts – 30 July 2019

**Assignment 1:** Carbon footprint in transportation expert – contribution to the reports with facts and survey analyses from the carbon footprint reduction point of view.

**Assignment 2:** Behavioural change expert – contribution to the contribution to the reports with facts and survey analyses from mobility behaviour change point of view.

#### Task 3. INTERREGIONAL WORKSHOP for Project Partners led by the external experts

The workshop is planned in Thessaloniki in 19-20 September 2019 (date to be confirmed) to discuss the survey results and facts to assist decision making with the view to preparing partners to run regional stakeholder group workshops.

**Assignment 1:** Carbon footprint in transportation expert – the presentation report conclusions and training of partners from the carbon footprint reduction point of view.

**Assignment 2:** Behavioural change expert – the presentation report conclusions and training of partners from mobility behaviour change point of view.

#### Task 4. Contribution INTERREGIONAL WORKSHOP ‘HOW TO CHANGE THE mobility BEHAVIOURS AND HABITS’

The workshop is planned in Valladolid in February 2020. The agenda will include:

* presentation of existing Good Practices relevant to the challenges identified by respective project partners,
* discussion – assessment and clustering – of ideas for solutions worked out with stakeholders at 3rd territorial workshops in each territory.

**Assignment 2: Behavioural change expert** willcontribute to the workshop providing feedback to participants and help in preparation of recommendations for partner territories.

#### Task 5. Evaluation of partners’ action plans and Contribution to INTERREGIONAL Feedback WORKSHOP

The action plan feedback workshop is planned in Kalisz in January 2021 (date to be confirmed) to provide recommendations to partners’ draft action plan. The experts will receive draft action plans before the meeting. They will contribute to the workshop providing ad-hoc feedback to participants. After the workshop they will formulate the recommendations to each draft Action Plan to feed 5th regional stakeholder group meeting organised in each partner territory.

Deadline for provision of recommendations for 5 territorial each draft Action Plans – 28 February 2021

## Requisites of the Experts

The offers will include the services of a nominate expert services for at least 17 working days for Assignment 1 and 21 working days for Assignment 2. The experts will have to accomplish the following requisites:

* University degree in a relevant field or equivalent.
* At least 6 years of relevant professional experience.
* Proficiency and fluency in English. Knowledge of other EU languages.
* Proven experience in designing research, including use of questionnaires and report/studies drafting.
* Proven expertise, in the field of the assignment.

**The proposal to be submitted requires the following documents:**

1. Statement with the price following the template included in Annex I
2. CV in Europass format of the Expert(s) – the CV needs to clearly show the fulfilment of the above mentioned requisites.

Please read the following clause and include its content in the offer documents.  
*“I agree to the processing of my personal data by the Adam Mickiewicz University Foundation in Poznan with headquarters in Poznan for the needs necessary to implement a current call for offers.”*

## Selection of offers

The offers will be selected pursuing the following criteria and scoring. In case of joint offers each assignment will be evaluated independently.

Criteria

The offers will be evaluated taking into account the two following criteria:

* Criterion 1. Price (50%): cheaper price will be higher valued.
* Criterion 2. Quality of human resources (50%): capacity, experience and excellence of the expert(s) proposed to respond to the services of the contract. This includes proven experience in interregional policy learning projects.

Scoring

Each offer will be assessed by using following algorithm:

1. For Criterion 1. Price (50%):

where:

*c1* – score for criterion 1

*lp* – lowest price offered for the assignment

*op* – the price of the offer scored.

1. Criterion 2. Quality of human resources (50%):

where:

*c2* – score for criterion 2

*oHRs* – score of expert experience in points assigned (as described below) of the offer assessed

*hHRs* – highest score of expert experience in points assigned (as described below) of the offers received .

The points for the criterion will be given for the following features of the offered expertise:

1. Proven experience in international applied research projects in the field of the assignment expertise. 1 point will be given for 1 project. Maximum number of points to be scored: 3;
2. Proven experience in collaboration with relevant public administration in the design and implementation of policy intervention (strategies, policies, legal acts, policy instruments). 1 point will be given for 1 project. Maximum number of points to be scored: 4;
3. Proven experience in international/interregional policy learning cooperation projects. 1 point will be given for 1 project. Maximum number of points to be scored: 3.

The result of the evaluation of the offers will be communicated to all applicants within one week after the deadline for submission of the offers, thus not later than 4th of March 2019

## Payments

**For Assignment 1**

* Up to 20 % of the overall expert fee price, will be paid after the completion of TASK 1. METHODOLOGY AND TOOLS FOR DIAGNOSIS, and upon delivery of a comprehensive report of the activities carried out.
* Up to 50% of the overall expert fee price plus the lump sum for 1 travel costs, will be paid after the completion TASK 2. DIAGNOSIS REPORT ON TRANSPORT BEHAVIOURS IN EACH TERRITORY AND RELATED CARBON IMPACT FACTS and TASK 3. INTERREGIONAL WORKSHOP FOR PPS LED BY THE EXTERNAL EXPERTS, and upon delivery of a comprehensive report of the activities carried out.
* Up to 30% of the overall expert fee price plus the lump sum for 1 travel costs, will be paid after the completion TASK 5. EVALUATION OF PARTNERS’ ACTION PLANS AND CONTRIBUTION TO INTERREGIONAL FEEDBACK WORKSHOP, and upon delivery of a comprehensive report of the activities carried out.

**For Assignment 2**

* Up to 15 % of the overall expert fee price, will be paid after the completion of TASK 1. METHODOLOGY AND TOOLS FOR DIAGNOSIS, and upon delivery of a comprehensive report of the activities carried out.
* Up to 40 % of the overall expert fee price plus the lump sum for 1 travel costs, will be paid after the completion TASK 2. DIAGNOSIS REPORT ON TRANSPORT BEHAVIOURS IN EACH TERRITORY AND RELATED CARBON IMPACT FACTS and TASK 3. INTERREGIONAL WORKSHOP FOR PPS LED BY THE EXTERNAL EXPERTS, and upon delivery of a comprehensive report of the activities carried out.
* Up to 20% of the overall expert fee price, will be paid after the completion of TASK 4. CONTRIBUTION INTERREGIONAL WORKSHOP ‘HOW TO CHANGE THE MOBILITY BEHAVIOURS AND HABITS’ and upon delivery of a comprehensive report of the activities carried out.
* Up to 25% of the overall expert fee price plus the lump sum for 1 travel costs, will be paid after the completion TASK 5. EVALUATION OF PARTNERS’ ACTION PLANS AND CONTRIBUTION TO INTERREGIONAL FEEDBACK WORKSHOP, and upon delivery of a comprehensive report of the activities carried out.

## Property of the results

All the written and graphic material produced during this contract will be the property of the Adam Mickiewicz University Foundation (PSTP) and will be able to be reused in the framework of the PE4Trans project, for the communication of the project or for other policy learning purposes out of the scope of the project.

With written permission, the contractor will be allowed to use the written material developed in the project providing a clear statement that it has been developed in the framework of the PE4Trans project financed by the Interreg Europe programme

## INFORMATION ON PERSONAL DATA PROTECTION

Pursuant to Article 13(1) and (2) of the General Data Protection Regulation of 27 April 2016, I inform that:

1. Adam Mickiewicz University Foundation based in Poznań (61-612) at ul. Rubież 46, hereinafter referred to as AMUF is the controller of Your personal data;
2. Agnieszka Lewandowska (e-mail: iod@ppnt.poznan.pl) is the Security Controller / Data Protection Inspector;
3. Your personal data will be processed for purposes of this “Call for offers” under Article 6(1)(a);
4. Personal data you have provided will be made available to other recipients: PE4Trans project partners, Polish First Level Controller of INTERREG EUROPE for PE4Trans project, Joint Secretariat of INTERREG EUROPE;
5. Personal data you have provided will not be transferred to any third country;
6. Your personal data will be stored until You withdraw your consent;
7. You have a right to access Your data and a right to rectify or remove them, restrict their processing, a right to transfer them, to object, to withdraw Your consent at any time without affecting the lawfulness of the processing that was performed on the basis of your consent before the withdrawal.
8. You have a right to submit a complaint to a supervisory authority if you find that the processing of Your personal data violates the provisions of the General data Protection Regulation of 27 April 2016.
9. You provide Your personal data voluntarily.
10. Your data will not be processed automatically, including profiling.

# Annex I.- Statement

The undersigned [*insert name of the signatory person*], representing the following legal person [*insert full official name if applicable*] located in [*insert full official address*] with the registration number [*insert official registration number, if applicable*]

hereby:

1. Declares its interest on carrying out the external expertise services to support the exchange of experience process in the PE4Trans project as it is described in the call for offers.

2. Offers the services of the expert [insert name of the expert] with the capacity, experience and excellence that could be seen in the attached CV:[[1]](#footnote-1)

**Assignment 1:** Expert on local transportation system analyses and planning and the carbon footprint calculation for the improved policy interventions

**Assignment 2:** Expert on behavioural sciences integrating psychological and sociological knowledge for design of solutions effectively influencing people behaviour for environmentally desirable

The person’s expertise includes *(fill in the tables below, if applicable. It is not absolutely required, but allows assignment of points in the offer evaluation as described in the call for offers description)*:

1. proven experience in the following international applied research projects

|  |  |  |  |
| --- | --- | --- | --- |
| Title of the project | Research domain | Funding programme/or institution | Project timeframe |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

1. proven experience in collaboration with relevant public administration in the design and implementation of policy intervention:

|  |  |  |  |
| --- | --- | --- | --- |
| Title of the project/activity | Policy intervention name | Public administration partner responsible for the policy | Project/activity timeframe |
|  |  |  |  |
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1. Proven experience in international/interregional policy learning cooperation projects

|  |  |  |  |
| --- | --- | --- | --- |
| Title of the project | Policy domain | Funding programme/or institution | Project timeframe |
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1. Offers for the external expertise services the following price:

**Assignment 1:** Expert on local transportation system analyses and planning and the carbon footprint calculation for the improved policy interventions

|  |  |
| --- | --- |
| A.- Unitary price working day\* | - € |
| B.- Overall expert fee price (A x 17 for the assgment days) | - € |
|  |  |
| C.- Lump sum travel\* | - € |
| D.- Overall costs travels (C x no. 2 travels) | - € |
|  |  |
| Total\* (B+D) | - € |

\* This price includes all taxes

**Assignment 2:** Expert on behavioural sciences integrating psychological and sociological knowledge for design of solutions effectively influencing people behaviour for environmentally desirable

|  |  |
| --- | --- |
| A.- Unitary price working day\* | - € |
| B.- Overall expert fee price (A x 21 for the assgment days) | - € |
|  |  |
| C.- Lump sum travel\* | - € |
| D.- Overall costs travels (C x no. 3 travels) | - € |
|  |  |
| Total\* (B+D) | - € |

\* This price includes all taxes

Done at [*insert place of signature*], [*insert date of signature*]

[*insert signature*]

[*insert name and function of the signatory*] [*Stamp of your organisation, if exists*]

1. Copy the section 2 if the offer addresses both assignments [↑](#footnote-ref-1)