



“PPI4MED - Technological transfer and commercialization of public research results through PPI in the Mediterranean region.”

Ref. No.: B_A.2.1_0136

Tender for External Services

Description: Consultancy service /Expert to develop a white paper on Public Procurement of Innovation (PPI) in Jordan

Tender No.: 1/2023

Contracting Organization:

The National Center for Research and Development (NCRD) - Jordan



The “PPI4MED - Technological transfer and commercialization of public research results through PPI in the Mediterranean region.” Ref. No.: B_A.2.1_0136, implemented and funded within the ENI CBC Mediterranean Sea Basin Programme, is launching a call for an External Expert (Sub-contacted Services) under the following Terms of References (ToR):

Details of the Contracting Authority:

| | |
|-------------------------|---------------------------------------------------------|
| Name of th organization | The National Center for Research and Development (NCRD) |
| Postal address | P.O.Box 902 Al-Jubaiha |
| Postal code | 11941 |
| City | Amman |
| Country | Jordan |
| Telephone | 00962-6-5335280/4 |
| E-mail | info@ncrd.gov.jo |
| Official website | www.ncrd.gov.jo |

1- Programme and project information

The 2014-2020 ENI CBC “Mediterranean Sea Basin Programme is the largest Cross-Border Cooperation (CBC) initiative implemented by the EU under the European Neighborhood Instrument (ENI). The ENI CBC Med Programme brings together the coastal territories of 14 countries in view of fostering fair, equitable development on both sides of the Mediterranean. Through calls for proposals, ENI CBC Med finances cooperation projects for a more competitive, innovative, inclusive and sustainable Mediterranean area.

2- Brief about PPI4MED project

The National Center for Research and Development (NCRD) is an implementing partner of **PPI4MED** project: “Technological transfer and commercialization of public research results through PPI in the Mediterranean region” funded by the European Union through the ENI - CBCMED program, covering various sectors including agriculture, industry, transport, water, health and energy.

The **PPI4MED** project is implemented in five countries: Spain, Italy, Tunisia, Egypt, **Jordan**, and aims to transfer the R&D results from National Research Centers (NRCs) to society through Public Procurement of Innovation (PPI) model.

PPI4MED project aims to boost the commercialization of research results from public research institutions through Public Procurement of Innovation (PPI) programs and projects, as well as private-public commercialization partnerships.

The project will raise the awareness of policymakers in each country to promote PPI as a strategic instrument to transfer results as part of the science-policy in each country. PPI can be a transformational instrument for scientific policy and R&D results financed by the public sector. Further information is available in the ENI CBC Med Programme official website:

<https://www.enicbamed.eu/projects/ppi4med>

3- Procurement, Funding and Contract Information

3.1 Funding of the Contract:

The contract is funded within the framework of the “PPI4MED - Technological transfer and commercialization of public research results through PPI in the Mediterranean region.” Ref. No.: B_A.2.1_0136, which is implemented under the ENI CBC Mediterranean Sea Basin Programme.

3.2 Duration of the Contract

The maximum available duration of the contract is from the day of signature until the end date of the project.

3.3 Value of the Contract

The maximum presumed amount of the contract is 4,000 EUR.

The project is exempt from tax.

3.4 Eligibility of Tenderers

The tender is open to legal entities (Private Companies, NGOs, Consulting Companies, etc.) and natural persons (External Consultants, Freelance Professionals, etc.), that are able to deliver the expected services under a “Service’s Contract”

3.5 Contract Payments

The payments of services and deliverables can take place after their partial or total completion and when the related invoice is issued.

The winning candidate will be notified by email of the selection of the offer. From that moment on work can start according to Deliverables and timeframes. Payments will be done as follows:

- Upon the approval of deliverable #1 gap analysis report the consultant will receive 20% of the contract

- Upon the approval of deliverable #2 final report and white paper the consultant will receive the remaining 80% of the contract

Payments will be done in a period of 30 to 60 days after reception and validation of the invoice. The Contracting Authority is not responsible for banking costs that might be applied by the consultant(s) bank, neither for changes in currency exchange.

4- PPI4MED Project Outputs Description

Scope of the Policy Makers Group (PMG)

PPI4MED project will create a Policy Makers Group (PMG) and will involve the key actors, entities and bodies responsible for innovation policy in Jordan. The role of this group is vital to maximize the impact and sustainability of the project result beyond PPI4MED. In particular, several objectives are pursued:

- Generate awareness in the policymakers about the importance of PPI as an instrument to transfer results from public R&D Centers.
- Align future policies with the potential of this instrument.

| Activity title | Outputs |
|---------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Activity 2.9.1 Creation of the policymaker's group | - Creation of the policymaker's database |
| A.2.9.2. Desk-research and webinar of Innovation Procurement | - Desk-research on innovation procurement as an innovation policy instrument and the transfer of public scientific results to the public needs and public procurers. - a webinar with the policymakers with the aim of to explain and share the main results from the analysis and how are they developing innovation procurment, create awareness to other policymakers and companies about the importance of innovation procurement as an instrument to transfer results from public R&D Centers, as well as to align future policies with the potential of this instrument. |
| A.2.9.3. White Papers PPI as an Instrument to transfer results from the R&D Research Center | create an innovation procurement guide for an instrument to transfer results from the R&D Public Centers, a White Paper on Innovation Procurement. |

5- Design and Development of the PMG (Can be used as Indicative Reference)

5.1 Identification of people responsible for the NRC.

They must be the same people responsible (institutional and technical), of the Living Lab activities.

5.2 Identification of policy makers.

Identify the entities and key people responsible for designing science, technology and innovation policies in Jordan (Ministries, departments or bodies with responsibility for STI policies). The representation of policy makers should be at the highest possible level, with decision-making capacity.

5.3 Setting up the PMG: invitation to participate.

Inviting the identified policy makers to participate in the PMG; either by direct contact with the responsible authority or by sending a letter (using the PMG document guidelines – Annex I).

5.4 Activities to be developed in the PMG.

The activities to be developed will focus on analysing and discussing the following topics:

- Advancement of the PPI4Med and the outputs obtained in each of the stages of the project (members of the PMG can put the Living Lab -NRC- in touch with potential public procurers).
- Economic and social benefits of Public Procurement of Innovation (PPI) as an instrument to transfer R&D results from public centres.
- Potential as an instrument for the industrial and innovation policy to create and develop industries, sectors and technologies.
- Impacts of using this instrument in critical strategic areas (energy efficiency, health, ICT, etc.).
- Potential as an instrument to aggregate public demand derived from synergies in the pooling of interests and needs in the Living Lab: more efficient public contracts and greater market impact.
- Complementarities with traditional PPI and other supply instruments (grants, subsidies, etc.).
- New management models for Intellectual Property Rights (IPR) and patent exploitation associated with the use of this instrument.
- Barriers to implement the instrument in a systematic and holistic way into the policies of Jordan (legal, technical, economic, etc.).

5.5 PMG meetings and tasks Six meetings (in July and August 2023): according to the schedule below.

Three face-to-face meetings and three online meetings as shown below:

| # | Date | Mode | Objective/Activity | Tools/Comments |
|---|-------------|---------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 0 | July/2023 | F2F/V | Kick off meeting with NCRD. | Tools, templates, plans |
| 1 | July/2023 | Virtual | <ul style="list-style-type: none"> • Presentation of PPI4MED. • What is PMG and why it is important. • Expected outcome of the meetings. | <ul style="list-style-type: none"> • Agenda objectives • WP5 presentation • Baseline survey results • brainstorming sessions |
| 2 | July/2023 | Virtual | <ul style="list-style-type: none"> • Gap analysis results • Identifying barriers • Sharing good practices | <ul style="list-style-type: none"> • Meeting agenda • SWOT analysis • Brainstorming. |
| 3 | July/2023 | F2F/V | <ul style="list-style-type: none"> • Progress and work carried out. • Align future policies. • Design the white paper for PPI model. | <ul style="list-style-type: none"> • Meeting agenda • Brainstorming |
| 4 | August/2023 | F2F/V | <ul style="list-style-type: none"> • Progress and work carried out. • Amend the white paper for PPI model. | <ul style="list-style-type: none"> • Meeting agenda • Drafted white paper |
| 5 | August/2023 | F2F/V | <ul style="list-style-type: none"> • Progress and work carried out. • Finalize the white paper for PPI. | <ul style="list-style-type: none"> • Meeting agenda • Final white paper |
| 6 | August/2023 | Virtual | <ul style="list-style-type: none"> • Celebration of completion activities • Certificate of appreciation • White paper for PPI model is ready | <ul style="list-style-type: none"> • Meeting agenda • Recommendations |

Table 1: PMG activities/proposed action plan

5.6 Participants in PMG meetings

Participants shall represent: public sector, private sector, universities, research centers, individuals, NGOs and others.

The target audience for online and face-to-face meetings are approximately 20 members.

6 Description of the work

The consultant shall develop the following work:

6.1 Gap analysis Report

Prior to conducting the meetings with the Policy Making Group, a gap analysis of the current procurement regulation and strategies and the needs of public procurement of innovation in Jordan, Public procurement as an innovation policy: Where do we stand? is required to assess the current state against the future desired state, using proper methods such as SWOT, PASTEL or else.

6.2 Conduct a webinar with the policymakers with the aim of explaining and sharing the main results from the analysis and how are they developing innovation procurement, create awareness to other policymakers and companies about the importance of innovation procurement as an instrument to transfer results from public R&D Centers, as well as to align future policies with the potential of this instrument.

6.3 Final report: Final report including methodology, tools, analysis, meetings outcome, participants, topics, work plan, challenges, recommendations, final results, future perspectives, and all other related information. (Report format must be reviewed and approved by NCRD).

6.4 White paper: White paper to be submitted to the Prime Ministry. The white paper should provide a decision maker with an overview of the current state, targeted analysis, and, actionable recommendations. (report format must be reviewed and approved by NCRD). The White Paper will propose a roadmap and guidelines of PPI and innovation, and industrial policies to implement the instrument in a systematic and holistic way in Jordan.

7 Expected outcomes from the assignment/consultant

- A gap analysis on PPI in Jordan.
- Prepare a white paper on PPI, in proper format, to submit to the Prime Ministry before Mid-Sep 2023.
- Prepare and submit a final report with lessons-learned and recommendations.
- Facilitating of PMG discussions.
- Note-taking and distribution of Minutes of Meeting (MoM) to participants.
- Perform activities according to the proposed action plan in table 1.
- Propose and use best methodologies to execute tasks on time.
- Submit bi-weekly progress reports
- Identify and prepare PMG participants list, and invite to participate in PMG meetings.
- Contribute to the PMG communication plan.
- Ensure analyzing and discussing the points mentioned above under the “activities to be developed in the PMG.”

8 Work arrangement

The work arrangement to ensure proper implementation and delivery of the PMG activities, are:

- The PMG members shall confirm their interests, commitment, and participations in the meetings.
- The consultant will agree on all tasks and activities with PPI4MED project manager from NCRD.
- The Minutes of Meeting (MoM) will be shared with PMG members after each meeting, using NCRD MoM template.
- The meetings could be attended F2F or online. The Consultant will arrange for both scenarios in partnership with NCRD team.
- Agenda of each meeting shall be communicated prior to each meeting.
- The duration of each meeting is between 30 – 60 minutes.
- Venue, tools and supporting technology shall be ready prior to each meeting.

- The communication plan will be shared with PMG members.
- The final report will be shared with PMG members.
- The white paper shall be approved by the PMG members.

9 Expected Duration of the assignment

Commencing as soon as possible after the anticipated award date and ending after the full scope of work, and delivery of the final report and white paper. The expected duration of the assignment (level of effort - LoE) is 15 working days.

Timeframe: July 2023 -September 2023

Note: Any other internal deadlines and milestones will be agreed among the Contracting Authority and the External Expert.

10 Location and format:

The events will take place in Amman- Jordan in different formats: face-to-face, online, or hybrid meetings to engage policy-making group members in PPI4MED project activities.

11 The anticipated timeline:

The timetable below is indicative and may be changed by NCRD at any time. Any necessary changes will be discussed and agreed with the External Expert.

| Activity | Anticipated date |
|------------------------------------------------------------------|-------------------------|
| Publication of “request for a consultancy service” | 19-June-2023 |
| Tender Deadline | 11 July |
| Screening, evaluating of proposals, Interviews of shortlisted CV | 12- 17-July-2023 |
| Final selection | 17 July-2023 |
| Signing consultancy contract | 19-July-2023 |
| Kick-off meeting with NCRD (online) | 20-July-2023 |
| Finalize meeting dates, participants, work plan, desk search | 23-July-2023 |
| Lead 3 face-to-face meetings and 3 online meetings with PMG | July 2023 – August 2023 |
| Submit a final report and white paper | 15-Sep-2023 |

12 Experts Profile

Successful Candidate/ External Expert

Mandatory Requirements

Education: BSc in business administration, management, international development, engineering or any related field (master degree is preferred).

- Must have a record of minimum 1 successfully implemented similar projects in terms of Policy development or white papers in the last 7 years and ongoing.
- Experience in implementing workshops for specific target groups

Failure to provide the minimum required criteria above is considered ground for disqualification.

Desirable Requirements

- Good knowledge of innovation eco-system in Jordan.
- Experience in the implementation of related activities for ENI CBC Med Projects
- Experience in implementation of related activities for EU Funded Projects

Skills

- Good knowledge of public procurement process and contract laws.
- Excellent facilitation skills and running focus groups.
- Good skills in stakeholder management, public sector involvement, time management, planning and organizing.
- Excellent written and verbal communication skills is required.
- Excellent report writing skills in Arabic and English languages.
- Excellent presentation skills.
- IT skills and using virtual meeting applications such as Zoom, Teams.

13. Evaluation Criteria

13.1 Proposal evaluation and selection:

Contracting Authority will evaluate technical proposals according to the following weights, criteria and importance:

- Technical: 70%
- Financial: 30%

Selection will be based on the technical quality and financial proposal. The award shall be made to the bidder receiving the highest final technical evaluation score and ranked no. 1 and with whom satisfactory price and terms can be negotiated and agreed.

The technical criteria (weight **70%**):

The detailed criteria and their respective weights in the Evaluation Grid defined as the below table. Unless otherwise indicated in the Evaluation Grid, any offer falling short of the technical threshold of 35 out of 50 points, is automatically rejected. Out of the offers reaching the 35-point threshold, the best technical offer is awarded 100 points. The other offers receive points calculated using the following formula:

Technical Score = (final score of the technical offer in question/final score of the best technical offer) x 100.

| # | Assessment criteria | Information to be provided | Points awarded |
|---|--------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| 1 | CV of the External Expert Interview of shortlisted CV | <ul style="list-style-type: none"> • Meet Required qualifications • Experience in implementing workshops for specific target groups • A shortlist of Consultant will be Interviewed online a set of skills : Communication, languages, planning, organizing, teamwork, flexibility, facilitation, leadership, presentation, and other related skills | 15 points - 5 points |

| | | | |
|--------------|------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|
| 2 | Proven experience to perform reports in English and Arabic relevant to the topics of the assignment | <ul style="list-style-type: none"> 1-2 years of experience in delivering similar projects. (1 references projects) | (20 points - 10 points each) |
| 3 | Proposed methodology and tools | <ul style="list-style-type: none"> Describe the methodology to follow for each type of service. Detail the type of tools to be used. Proper Work plan according to assignment deliverables | (15 points - 5 points each) |
| Total | | | 50 |

The financial criteria (weight **30%**):

The total prices will be taken into account in the comparison of the financial offers. The offer with the lowest amount receives 100 points. The other offers receive points calculated using the following formula: Financial Score = (lowest amount/ amount of the financial offer in question) x 100. For the overall evaluation of the tender, Overall, the offer which obtains the highest weighted score (70% for the technical score and 30% for the financial score) will be awarded the contract.

14. Submission of Tender and Supporting Documents

14.1 Deadline for Submission of the Tenders

The deadline for submission of tenders is **Tuesday 11 July 2023**. Any tender received after this deadline will be automatically rejected.

14.2 Address and Means of Submission of the Tender

The Tender will be submitted in 1 (one) original. In case of e-mail submission, the tenderer may provide an electronic version. Any tenders not using the prescribed form shall be rejected by the contracting authority.

1) If delivery by post or courier, the tenders will be submitted in an envelope including and will contain the following information at the external part: Name and address of the contracting authority Contact person Title of the tender Reference number Name and address of the tenderer

2) If delivery by delivery by e-mail, the message will be sent to: purchasing committee

Email : **info@ncrd.gov.jo**

and will clearly indicate:

- Title of the tender
- Reference tender number
- Name and address of the tenderer
- The tender submission package and any supporting documentation as attachment (preferable format is pdf).

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- **Proposals must be prepared in English.**

14.3 Validity of proposal

The proposal must remain valid for a period of 90 days.

14.4 Supporting Documents

The tenderers will submit their tenders using the standard submission form available in Annex II of this tender. The Contracting Authority may request any additional supporting documents, that are necessary for the evaluation of the Tender and/or are required by the National Legislative Framework.

14.5 Provisions and Other Remarks

The selection procedure will be in line with the ENI CBC MED requirements and National Laws. In addition, the following will be taken under consideration:

- Equal Treatment & Non-discrimination

The Contracting Authority ensures that all participants in a procurement procedure need to have equal rights and obligations. As a result, there are no discriminatory practice or technical specifications liable to hamper wide participation on equal terms by all natural or legal persons.

- Transparency & Fair Competition

The procurement procedures are based on specified eligibility (for formal submission), exclusion, and award criteria. The Contracting Authority also ensures that there is adequate publication, in reasonable time, of the prior information notices, contract notices and award notices, as well as sufficient information in the invitations to tenders on the award and contract criteria and requirements. In addition, any actions that are against fair competition are prevented.

- Conflict of interest

The Contracting Authority takes all measures to prevent any situation where any kind of conflict of interest may arise. These restrictions also apply to any sub-contractors and employees of the tenderer or contractor.

- Data Protection

The purpose of processing of the data submitted by the candidate tenderers is to manage the application of the candidate in view of a possible selection and award of contract by the Contracting Authority. The Contracting Authority does not make public the names of successful candidates on reserve lists. Any supporting documents requested at any stage of the tender evaluation process are kept in confidence. The personal and sensitive information requested are processed in line with Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data and repealing Directive 95/46/EC (General Data Protection Regulation).

Annex II – Format of Offer to Be Provided by the Tenderer

OFFER TO BE PROVIDED BY THE TENDERER

1- TENDERER'S INFORMATION

Offer submitted by:

| | |
|--------------------------------------------------------|--|
| Name of legal entity or entities submitting the tender | |
| Address | |
| Legal registration number if applicable | |

Contact person:

| | |
|----------------|--|
| Name | |
| Telephone | |
| e-mail address | |

2-TENDERER'S STATEMENT

I undersigned hereby confirm that the services offered in this tender are in full conformity with the specifications submitted to us by the contracting authority. The detailed description of the offered services/supplies/works is provided in the technical offer. In addition, I confirm that our entity is fully eligible for providing services under a contract financed by the EU and it is not in any of the situations that would mean an exclusion from a tender. Finally, I declare to have no conflict of interest with any other concerned party in the tender procedure at the moment of submitting this tender.

3-TECHNICAL OFFER

Technical (maximum 5 pages,):

The Consultant should elaborate a specific proposal to conduct the work based on the tasks described in the section: "description of work", elaborating it further.

An implementation calendar should be delivered.

Profile and project references (maximum 2 pages): the consultant(s) should submit a brief explanation of the candidate and project references on the topic.

4- Financial Offer

The total price for the offered services is (XXXXX XXX)EURO or (XXXXX XXX JOD)National Currency This price does not include VAT.

The project is exempt from tax

The offered price includes the execution/delivery of the items described in the technical offer, as well as all the related incidental costs, such as transport, logistics, etc., when required. Please include a breakdown, in accordance with the items in the technical offer. For fee-based service contracts, include the number of expert days and the daily fees, as well as the breakdown of the incidental costs.

| | |
|------------------|--|
| Name | |
| Signature | |
| Date | |