

Annex 5

External expert engagement form

The aim of this form is to gather structured information on the needs and requirements for engaging external expert support in the preparation and/or development and implementation of implementation formats (IFs) within the EUSAIR framework. The form specifies the required competences and scope of work, and is intended for use by EUSAIR stakeholders from the Adriatic-Ionian Region. It serves as the basis for EUSAIR governance support projects to prepare Terms of Reference (ToR) for engaging external experts via transparent public procurement procedures, ensuring consistency and quality in the provision of technical assistance.

The form must be completed by the relevant stakeholder (applicant) from the Adriatic-Ionian Region, depending on the purpose and phase of expert engagement.

1. Purpose of expert engagement:
<input type="checkbox"/> Support in the preparation of IFs (Toolkit templates drafting) <input type="checkbox"/> Support in the development and implementation of IFs
2. Type of IF support is requested for:
<input type="checkbox"/> Flagship initiative (Annex 1) <input type="checkbox"/> Project fiche (Annex 2) <input type="checkbox"/> Master plan / Action plan / Roadmap (Annex 3) <input type="checkbox"/> Knowledge and support format (Annex 4) <input type="checkbox"/> Other: _____ (e.g., project proposal development)
3. Title of the IF support is requested for:
4. Description of the IF support is requested for:
<i>If the support is requested for the development and implementation of IFs, it is not necessary to fill out this section just send prefilled relevant annex as attachment.</i>
<i>Please shortly describe the IF support is requested for, e.g. rationale, key challenges, needs, objectives, etc. (up to 1000 characters)</i>
5. Number of experts required:
<input type="checkbox"/> One key expert <input type="checkbox"/> A group of key experts / expert team

6. Required Competences and Profile

*If more than one expert is needed, please **duplicate this section** for each expert profile needed, and clearly indicate **Expert 1, Expert 2, etc.***

A) Key expert label

Key expert 1 Key expert 2 Key expert 3 Other: _____

B) Thematic expertise:

Please specify general (thematic) expertise required (e.g., Blue Economy, Transport, Energy, Environment, Tourism, Social Cohesion, etc.)

C) Specific expertise (select or specify):

Please specify general (thematic) expertise required (e.g., Biotechnology, Marine transport, Renewable energy, Natural heritage and biodiversity, Sustainable tourism, Higher and vocational education, Entrepreneurship, etc.)

D) Methodological skills (select or specify):

- Strategic planning and foresight
- Policy analysis and recommendation drafting
- Socioeconomic and impact assessment
- Stakeholder engagement / participatory facilitation
- Data analysis and evidence-based support
- Other: _____ (please specify)

E) Educational requirements (select or specify):

- University degree (minimum, EQF level 6 or equivalent)
- Master's degree (EQF level 7 or equivalent)
- PhD (EQF level 8 or equivalent)
- Other: _____ (please specify)

F) Language skills (select or specify):

- Excellent command of written and spoken English
- Familiarity with regional/national languages (please specify): _____

G) Minimum experience requirements (select or specify):

- At least ___ (*number*) years of experience in relevant professional or academic field
- Familiarity with EU macroregional strategies (especially EUSAIR)
- ___ (*number*) years of experience in preparation and implementation of EU-funded projects
- Prior involvement in implementation or advisory work
- Other: _____ (please specify)

7. Description of the assignment**A) Scope of work**

Please describe the expert's/s role and key tasks to be carried out, e.g., format review, facilitation of workshops, data validation, background study, provision of technical or policy advice (up to 2000 characters)

B) Expected deliverables/results

Please describe expected deliverables/results of the expert's/s engagement, e.g., ToR, completed template for flagship initiative, project proposal development, technical note, methodological input, stakeholder brief, roadmap section, number of workshops delivered, etc. Connect the listed expected deliverables/results with scope of work and IF. (up to 1500 characters)

8. Expected workload

Estimated time needed to complete the assignment: _____ (please specify number) of
(please select)

- working days
 expert days
 months
 other: _____ (please specify)

9. Selection criteria (please select or specify):

- Relevant governance support project partner supporting the relevant Pillar will define the selection criteria based on their internal procedures to be followed.
 Lower price/Price and references ratio (please specify the methodology and ratio for selection between the economic offer and the references: _____)

10. Additional information

Please specify any other instruction for the procurement if necessary.

Filled in Annex 5 and corresponding annexes (if applicable) should be submitted via e-mail to the one of the following addresses:

- TSG1:
- TSG2:
- TSG3:
- TSG4:
- TSG5:

Next Steps

Based on the information gathered through this form and other relevant annexes (if applicable), the responsible governance support project partner will prepare the ToR for engaging external expert(s) via a public procurement procedure.

If necessary, the governance support project partner may **contact the applicant directly** to further clarify or refine the expert profile and assignment in order to finalize the ToR in alignment with the specific needs for which IF support is requested.