

TERMS OF REFERENCE – PART A

Specific Contract

“Support Services to the EU Programme Inclusive Societies in LAC: Social Dimension of the EU-LAC Global Gateway Investment Agenda”

1 BACKGROUND INFORMATION

Policy Context

Human development has been part of the bi-regional agenda for years, and it is present in the political agenda of many Latin America and Caribbean (LAC) partners in their bilateral relations with the EU.

The Communication JOIN(2023)17 “A New Agenda for Relations between the EU and LAC” reflects the EU vision on how to promote sustainable economic growth for human development. It builds on the previous Communication JOIN(2019)6 “*EU, Latin America and the Caribbean: joining forces for a common future*”, which highlighted already that investing in people is key to support the EU-LAC partnership for prosperity, democracy, resilience and effective global governance bringing forward connectivity. EU-LAC Foreign Ministers confirmed this shared agenda at the EU-LAC Leaders’ meeting in December 2021.

The EU-CELAC Leaders’ Summit Declaration in July 2023¹ represented an important milestone in the bi-regional partnership. Leaders committed to promote gender equality, fight discrimination and gender-based violence, respect fundamental labour rights and standards, and respect the rights of persons in situations of vulnerability, while considering intersectionality. They also committed to advancing the work on access and local manufacturing of vaccines, medicines and health technologies; and to strengthen resilience of health systems to improve prevention, preparedness and response to public health emergencies. They agreed to cooperate to mitigate the adverse effects of climate change and environmental degradation, and stressed the importance of promoting a responsible, human-centric, values-based and inclusive digital transition.

In this context, leaders endorsed the EU-LAC Global Gateway Investment Agenda (GGIA), to address investment gaps and mobilise funding for sustainable development, including areas such as digital connectivity, climate change and energy production, raw materials, health and local value chains.

The Council Conclusions in November 2023 on “Relations between the EU and LAC”², and more broadly on “Social, Green and Digital Transition”³ gave further guidance on the vision for the way forward. They reaffirmed the commitment to strengthen the Team Europe’s response for human development and reinforce its importance in the transitions.

The Global Gateway Strategy in LAC

Global Gateway (GG) is the EU’s contribution to narrowing the global investment gap worldwide. Partnerships are based on 6 principles: democratic values and high standards; good governance and transparency; equal partnerships; green and clean; security focused; and catalysing private sector investment. It is fully aligned with the UN’s Agenda 2030 and its Sustainable Development Goals (SDGs), as well as the Paris Agreement and the commitment of the G7 leaders from June 2021 to launch a values-driven, high-standard and transparent infrastructure partnership to meet global infrastructure development needs.

Global Gateway focuses on areas of infrastructure that bring solutions to the various challenges in the current geopolitical context. It is centred around 5 policy drivers: 1. Digital: strengthening connections and helping partner countries address the digital divide and integrate the global digital ecosystem; 2. Climate & Energy: supporting investments in climate mitigation and resilience, as well as clean energy; 3. Transport: Promoting worldwide infrastructure investments that create sustainable, smart, resilient, inclusive and safe networks; 4. Health: Strengthening healthcare capacities and helping us to overcome diseases such as COVID-19,

¹ <https://www.consilium.europa.eu/en/meetings/international-summit/2023/07/17-18/>

² [Latin America and the Caribbean: Council approves conclusions on EU-LAC relations - Consilium \(europa.eu\)](#)

³ [The Council approves conclusions on a social, green and digital transition - Consilium \(europa.eu\)](#)

malaria, yellow fever, tuberculosis or HIV/AIDS; 5. Education & Research: Investing in quality education, paying attention to include vulnerable groups, and strengthening cooperation on research and innovation.

As highlighted at the EU-CELAC Summit in July 2023, the EU-LAC Global Gateway Investment Agenda (GGIA)⁴ is a key element of the bi-regional agenda for years to come. The EU is now implementing this ambitious agenda in cooperation with partner countries and public and private stakeholders. To date, the EU-LAC GGIA includes 134 projects across LAC countries (except Nicaragua), which represent the EU's GG strategic priorities for the region, with a Team Europe potential of EUR 45 billion for the period up to 2027.

Building on the unique possibilities of the region in terms of biodiversity and natural resources and considering the challenges such of inequalities, the agenda focuses on advancing the fair green and digital transition. It includes activities ranging from 5G extension to remote areas, green bonds, greener transport systems, clean hydrogen energy and better health infrastructures to scaling up joint research. It should result into smarter, cleaner and more secure links between the two regions and in promoting the values of good governance, transparency and sustainability to improve the lives of many, including the most deprived and those facing inequalities.

The GGIA projects will be implemented in an inclusive manner mainly through the EU Delegations in LAC, in close collaboration with all relevant partners including public and private stakeholders. Global Gateway will build on the close ties between the two regions to create a partnership where the public sector (including authorities, development banks and national export credit agencies) link up with the private sector, to generate business investments that can contribute to wealthier societies to the benefit of all.

The Regional Team Europe Initiative (TEI) “Inclusive and Equitable Societies”

The Regional Team Europe Initiative on “Inclusive and Equitable Societies” was officially launched by EU Commissioner Jutta Urpilainen at the EU-LAC High Level Event on “Inclusive Human Development and Equitable Access to Health Products” (Brussels, 21-22/03/2024). Aside from INTPA, the official TEI involves at least 6 EU Member States: Spain (co-lead), France, Germany, Italy, Luxembourg and Sweden.

The TEI aims at three overarching goals linked to the achievement of the SDGs (mainly SDGs 5, 10 and 16): i) facilitating access to social rights and basic social services to empowering people ii) enhancing inclusive, accountable and transparent institutions, iii) promoting social innovation, resilience and just transitions.

The TEI shall contribute to fostering the social dimension of the Global Gateway Investment Agenda from a 360° approach. It focuses on education, social inclusion and social cohesion, and tackle inequalities in general with a strong focus on women and youth. Priority strategies are built around 5 key areas oriented to underpin the Global Gateway strategy and to consolidate EU-LAC partnerships on social policies, namely: 1) Gender Equality and Youth Empowerment; 2) Education and Training, including TVET and skills development oriented to employability of vulnerable groups; 3) Social inclusion through decent jobs, labour and social rights, inclusive investments, and social dialogue; 4) Social protection, care policies and wellbeing economies and 5) Social innovation to foster just, green and digital transitions, closing social gaps in the green/blue/digital economy. Good governance and democratic participation will be horizontal priorities.

The regional EU programme “Inclusive Societies in LAC” (described below) is one of the main EU contributions to this regional TEI, which is considered an Equality Flagship. It represents an important building block, complementing EU Member States contributions. **The service contract corresponding to the present Terms of Reference will be financed in the framework of this programme.**

The regional TEI is complemented in the health front by the EU-LAC Partnership on Health Resilience and Equitable Access to Health Products, building on the initiative presented in June 2022 by Commission's President Ursula Von der Leyen, and Spanish President Pedro Sánchez.

Overall, both initiatives shall contribute to address social challenges, reinforce social policies and systems resilience, promote investment and social innovation in LAC for the achievement of the SDG commitments.

⁴ Please refer to: [EU-LAC Global Gateway Investment Agenda \(europa.eu\)](https://europa.eu)

The EU Programme “Inclusive Societies in Latin America and the Caribbean (LAC)”

The Action “Inclusive Societies in Latin America and the Caribbean (LAC)” was approved by the College of Commissioners in June 2023 as a part of the Commission Implementing Decision C(2023) 3893 on the financing of the Annual Action Plan part I in favour of the Americas and the Caribbean for 2023. This EU funding contribution is part of the Regional Multiannual Indicative Plan 2021-27 for the Americas and the Caribbean, linked to the goals as defined in Priority Area 5 on social cohesion and addressing inequalities.

EU Commissioner Ms. Jutta Urpilainen announced this commitment, involving an EU budget of €60 million, during the high-level opening of the EU-LAC Forum with Youth, Civil Society and Local Authorities (Brussels, 13-14 July 2023)⁵. The later was organised as a part of the EU-LAC Days that preceded the III EU-CELAC Summit of Heads of State and Government (Brussels, 17-18 July 2023).

The main objective of the Action is to tackle gender and other inequalities, reduce poverty and social exclusion, and enhance social cohesion within/between LAC countries, by means of the following specific objectives: 1) improving access to social rights, social services and justice for vulnerable groups; 2) contributing to more inclusive, accountable and transparent public institutions that promote equity driven and gender-responsive public finance models to reinforce social policies and protection systems; and 3) fostering new solutions and unlock investments that boost social innovation, resilience of social systems, and just, socially responsible and inclusive green/digital transitions. The programme encompasses several contracts: a Contribution Agreement with 4 EUMS (EUR 43mn), a Grant “Social Accelerator” (EUR 15mn) and Technical Assistance.

2 OBJECTIVE, PURPOSE & EXPECTED RESULTS

➤ Global objective of the contract

The global objective is to strengthen the Global Gateway Investment Agenda (GGIA) development and implementation in Latin America and the Caribbean from a 360° approach, by facilitating the coordination between the GGIA initiatives and related actions in the Human Development Sector.

➤ Specific objective(s) of the contract

The contract will have the following specific objectives oriented to:

- Support the roll-out of the Team Europe Initiative “Inclusive and Equitable Societies” and the successful implementation of the EU Programme “Inclusive Societies in LAC” in all its dimensions, putting a particular focus on Objective 3. (See above).
- Support the coordination and alignment of the TEI with the EU-LAC Global Gateway Investment Agenda, contributing to its implementation according to the principles and values of the Global Gateway Strategy, and supporting the materialisation of its actions.
- Contribute to enhance the social dimension of the EU-LAC Global Gateway Investment Agenda from a 360° approach, by building synergies with related actions in the field of human development (notably health and education), and by identifying opportunities and good practices at regional/country level.
- Provide advice and technical support to the European Commission in the design and implementation of EU external actions in the field of human development, so as to fulfil the overall goal of the RMIP 2021-27 of promoting social cohesion and fighting inequalities in Latin America and the Caribbean (LAC).

➤ Requested services, including suggested methodology

The service is mobilised at the request of INTPA B1 - “Green Transition and Human Development” and it will operate under its leadership. The experts mobilised for this contract will not have any representation role

⁵Please see: [EU-Latin America and the Caribbean Forum: Partners in Change \(europa.eu\)](https://european-council.europa.eu/media/en/press-operations/infographic-117426.pdf)

on behalf of the European Commission. In case that expenditure verification is required, the contractor shall include the name of the proposed auditor in its methodology.

The requested services will entail working hand-in-hand with the horizontal and geographical teams in charge of LAC (mainly INTPA B1 and B2), and it may require collaborations with other INTPA Directorates (e.g. INTPA D, E and G) and other Commission services (e.g. DG EMPL, ECHO, JUST, etc.), as well as with the EEAS.

The contract will deliver support in the first place to the LAC partner countries and secondly the European Commission to further identify and develop the LAC Global Gateway Investment Agenda (both regional and national GG investments) by ensuring the inclusion of human development and equality. The contract will require a specific scope of action in Latin America and the Caribbean, since regional actions benefit all 33 countries in the region.

The contract will coordinate closely with the Specific Contract “Advisory and Support Services to the TEI Inclusive and Equal Societies in Latin America and the Caribbean (LAC)” and will ensure complementarity of both services.

Main tasks to be performed successfully within the contract include, among other:

- To promote coordination and exchange of information among actions/initiatives/programmes that contribute to the objectives of the GGIA in LAC from a 360° approach, notably with Member States, their implementing agencies, LAC third countries, financing institutions and export credit agencies, EIB and other relevant European actors including the private sector, local and non-governmental organisations as relevant. To support meetings and events with relevant stakeholders for the development of GGIA projects, e.g. INTPA HQ, EU Delegations, regional, national and local government authorities, Member States, relevant offices of MS implementing agencies, financing institutions and Export Credit agencies, the EIB and International Financial Institutions, European private sector and European Chambers of Commerce, civil society, private sector, etc. (including minutes, agendas in consultation with members, etc.).
- To support the preparation of reports and summaries on Team Europe’s progress in implementing actions related to the GGIA from a 360° approach that contributes to social cohesion and inequality reduction, including specific showcasing of results as needed.
- To provide support to GGIA Project Teams in the management, implementation and coordination of human development actions directly managed by INTPA B, and in close coordination with INTPA G4 and other relevant Commission services.
- To support in the organisation of the EU-CELAC 2025 Summit for all aspects related to the “Inclusive Societies programme”.
- To contribute to identify, define and analyse human development opportunities within GGIA investment projects in the different fields to foster the social dimension of the investments.
- To identify, review and monitor the financial contributions to relevant GGIA projects and related TEIs, and support their coherence and strategic relevance by tracking the indicators, results and objectives.
- To support the preparation and implementation of relevant GGIA outreach and communication actions led by INTPA 02, including: briefings, mapping of relevant counterparts, preparation of joint messages with EU MS, analysis, support dissemination of these messages, etc.
- To follow relevant policy developments on the topics related to the GGIA in the LAC region and the EU and share this information to relevant Team Europe actors. To comment/contribute to the drafting of briefings, notes, field missions preparations, and other.
- To contribute to policy analysis and *ad hoc* advise in relation to human development policies in LAC, supporting research and data collection as needed. That may imply among other things to contribute to the review and analysis of existing strategies in LAC countries, supporting the identification of key priority areas and interests at regional and country level.
- To provide general support to the planning, delivery and follow-up of the TEI and the EU programme, through effective and efficient coordination, communication, monitoring and stakeholders’ engagement, including with the private sector, local authorities and non-state actors.
- To bring technical support to EUDs remotely or (exceptionally) in the field.

- To contribute to organise sectoral events or stakeholders' meetings, consultations, workshops, seminars or training courses in the area of human development, so as to build up networks and develop partnerships (eg. by bringing together EU and LAC companies, academia, innovation centers, civil society), and to support the identification of innovative multi-stakeholder partnerships for increased opportunities and private investments.

➤ Expected results

The contractor is expected to deliver high quality and timely services, aiming at the results described below:

- Output 1: Relevant EU-LAC networks, policies and partnership opportunities are identified and the LAC third countries, Commission Services and other relevant key stakeholders receive appropriate support for the interaction.
- Output 2: LAC third countries, INTPA HQ and EUDs are provided with practical and technical support to better align the programme actions to the strategic needs of the EU-LAC Global Gateway Investment Agenda.
- Output 3: Relevant third country stakeholders, EU MS and Commission Services receive the necessary technical support and thematic advice as to conduct the above actions successfully.

When delivering the required outputs, the contractor shall consider the core objectives of the TEI and the EU Programme "Inclusive Societies in LAC" and take into account that all EU funded actions must promote the strategic objectives of the EU, notably in the achievement of the Global Gateway strategic objectives.

In their proposal and methodology, the contractor shall also describe how the action will contribute to gender equality goals since this contract is embedded into a Gender Marker 2 Action. It shall also consider cross-cutting matters related to European Commission policies, such as environment and climate change, rights-based approach, persons with disability, indigenous peoples and gender equality.

The contractor shall present a general workplan to the European Commission for the delivery of the services. A quick-off meeting will be envisaged at the start of the contract to debrief the experts and provide strategic guidance. The initial workplan will be agreed with INTPA services with the possibility to update it every 3 months, and/or to introduce amendments if needed. The overview of actions achieved, ongoing actions and foreseen actions will be then formalised and followed up via the reports foreseen for this contract.

The Contractor and the European Commission will meet at least twice a year at the request of INTPA.B1 to ensure appropriate follow up of the smooth implementation of the contract. The meetings will take place in Brussels (INTPA HQ), or otherwise via videoconference if the Commission services agree. The Commission reserves the right to call for *ad hoc* meetings in case that the implementation requires it.

Close coordination with INTPA B services in Brussels is a must, as well as with EU Delegations in LAC countries when appropriate, for rapid resolution of problems that may arise during implementation. Video conferences shall be organised by the contractor at the request of the European Commission with all parties involved to follow up and report on the workplan and related activities as needed.

3 LOGISTICS AND TIMING

Please refer to Part B of the Terms of Reference.

4 REQUIREMENTS

Please refer to Part B of the Terms of Reference.

5 REPORTS/DELIVERABLES

The contractor must provide the following reports, in addition to the inception workplan:

- **Short bi-monthly reports** (4 pages maximum, to be submitted in English). They will provide a very

brief update on main activities, key achievements, relevant highlights and points of attention.

- **Annual progress reports** (20 pages maximum, to be submitted in English including a short executive summary of 2 pages maximum both in English and Spanish). Progress reports shall be submitted on a yearly basis with a more detailed description of progress on the activities, problems encountered and proposed solutions, planned activities and recommendations for the upcoming period.
- **Final report** (40 pages maximum, to be submitted in English including a short executive summary of 2 pages maximum both in English and Spanish). It shall be presented at the end of the contact to recapitulate on the main activities and achievements obtained within the framework of the contract, including problems encountered and key recommendations.

Language

The language of the Specific Contract is **English**, although Spanish may be used on regular basis. Therefore, good knowledge of English and Spanish is required for the experts (French and Portuguese may be an asset).

All reports and ad hoc requests shall be submitted primarily in English, while considering the above-mentioned provisions. Annexes can be presented in English/Spanish/Portuguese/French if needed.

Format

Brief monthly reports shall be delivered to the Commission services (INTPA B1) in an electronic format only, on the first working day of each calendar month and with a deadline of two weeks for comments.

Annual progress reports and final reports shall be delivered electronically subject to an acknowledgement of receipt by the Commission services (INTPA B1), and they shall be subject to formal approval by them with the possibility of issuing comments and requesting further clarifications.

For all other matters relating to reports/deliverables, please refer to Part B of the Terms of Reference.

6 MONITORING AND EVALUATION

Definition of performance and quality indicators

The following indicators will be used to assess the performance of the consultant:

- Efficiency in the coordination with GGIA stakeholders and with the related actions/programmes, taking also into account the work of the relevant TEIs.
- Efficiency of coordination between GGIA stakeholders and the programmes in the field of human development, in particular B managed actions (but not exclusively).
- Number of impactful opportunities for dialogue and collaboration with partner countries in LAC and/or with EUMS.
- Impact and quality of the involvement in impactful opportunities conducted/ identified for dialogue and collaboration with EU stakeholders and with partners in LAC, eg. involvement in outreach events, etc.
- Sectoral expertise to contribute to the processes and support evidence-based decision-making.
- Number/Quality of output documents relevant for the GGIAs/TEI. Quality will be judged by the clarity, display of expertise and comprehensiveness with which the expert(s) cover the topic.
- Attainment of the agreed deadlines and consideration to the timeliness of the support.

7 PRACTICAL INFORMATION

Please address any request for clarification and other communication to the following addresses:

INTPA-B1@ec.europa.eu

Copy to:

Ms. Yolanda RODRIGUEZ O'BRIEN, Programme Officer “Human Development”, INTPA B1
E-mail: Yolanda.RODRIGUEZ-O-BRIEN@ec.europa.eu (person in charge of the contract)

Ms. Anna HERRERO ROMEU, Programme Officer “Human Development”, INTPA B1
E-mail: Anna.HERRERO@ec.europa.eu

* * *

TERMS OF REFERENCE – PART B

BACKGROUND INFORMATION

1. Benefitting Zone

Latin America and the Caribbean region

2. Contracting authority

The European Union, represented by the European Commission, B-1049 Brussels, Belgium.

3. Contract language

English

LOCATION AND DURATION

4. Location

The place of employment for the experts will be in Brussels with a view to have a constant interaction with INTPA staff responsible for the programme.

Experts can work from their premises, based in Brussels, but should be ready within short notice to come to the Commission's premises in Brussels. The contractor is responsible to ensure that experts have access to working tools, equipment and office space as needed.

Mission(s) outside Brussels to fulfil the objectives of this contract are possible, subject to prior Commission's agreement.

5. Start date and period of implementation

The indicative start date is 15/01/2025 and the period of implementation of the contract will end on 15/12/2027.

REQUIREMENTS

6. Expertise

The expertise required for the implementation of the specific contract is detailed below.

The starting date for the mobilisation of the expertise will be determined by INTPA electronically via administrative notice. Experts will operate according to the guidance provided by the relevant statutory staff in INTPA B1.

All experts will provide technical assistance to the general work of the programme Inclusive Societies, and respond to specific assignments and deliverables of the contract as defined in the ToRs. They will be directly responsible for the timely delivery of the requested products.

All experts must be equipped with IT and telecom systems that allow them to communicate with INTPA in a timely manner, and that are compatible with the ones used by Commission services. Comprehensive backstopping shall be provided as needed to ensure quality of the services.

Key Expert 1 Team leader - Education and Skills

- General description of the position: Technical assistance to support the strategic needs of the EU-LAC Global Gateway Investment Agenda in the field of human development – notably the

strategic priority on inclusive education and skills development -, and to ensure synergies and alignment of the programme actions and general objectives.

- Expert category: Cat. II (>6 years of experience)
- Qualifications and skills required: University degree (Master level) in social sciences, economics, business administration, education and skills development, or a relevant discipline for human development.
- General professional experience: At least 3 years of professional experience in the field of human development. Good understanding of the EU Global Gateway Strategy. Experience working in social cohesion and inequalities with a gender-responsive approach.
- Specific professional experience: At least 3 years of professional experience in the field of education and skills development. Experience working with private sector stakeholders or international financial institutions. Experience working in Latin America and the Caribbean will be an asset, especially if linked to resilience and quality of education systems, skills development and TVET, social innovation, social investment mobilisation, etc.
- Language skills: Fluency in written and spoken English and Spanish is a requirement; knowledge of French and/or Portuguese is considered an advantage.
- Number of working days: 400 days

Key Expert 2 - Human development: education and health

- General description of the position: Technical assistance to support the strategic needs of the EU-LAC Global Gateway Investment Agenda in the field of human development – and to ensure synergies and alignment of the programme actions and general objectives.
- Expert category: Cat. II (>6 years of experience)
- Qualifications and skills required: University degree (Master level) in social sciences, economics, business administration, education, health or a relevant discipline for human development.
- General professional experience: At least 3 years of professional experience in the field of human development. Good understanding of the EU Global Gateway Strategy. Experience working in social cohesion, youth and inequalities with a gender-responsive approach.
- Specific professional experience: At least 3 years of professional experience in the field of human development with a strong experience and background on health and social services. Experience working with private sector stakeholders or international financial institutions in promoting equitable access to health.
- Language skills: Fluency in written and spoken English and Spanish is a requirement; knowledge of French and/or Portuguese is considered an advantage.
- Number of working days: 400 days

7. Incidental expenditure

The provision for incidental expenditure covers ancillary and exceptional eligible expenditure incurred under this contract. It cannot be used for costs that should be covered by the contractor as part of its fee rates, as defined above. Subject to prior approval by INTPA B1 services directly responsible for this contract, it can include, among others:

- Travel costs and per diems for the experts
- Travel and accommodation costs for entitled participants/stakeholders
- Venue rental and support/communication materials for events/activities
- Catering
- Translation/interpretation services

The provision for incidental expenditure for this contract is EUR 250 000. This amount must be included unchanged in the budget breakdown.

If applicable, see part A of the Terms of Reference for more details on the use of the incidental expenditure.

8. Lump sums

No lump sums provided for in this contract.

9. Expenditure verification

An expenditure verification report is required for interim and final payments.

The provision for expenditure verification covers the fees of the auditor charged with verifying the expenditure of this contract for the contracting authority to check that the invoices submitted are due.

Tenderers are required to indicate, in their “Organisation and Methodology”, the name and address of the proposed auditor or audit firm in charge of producing the expenditure verification report(s).

The provision for expenditure verification for this contract is EUR 10 000. This amount must be included unchanged in the budget breakdown.

10. Other details

No other details provided for in this contract.

REPORTS AND DELIVERABLES

11. Reports and deliverables requirements

Title	Content	Language	Submission Deadlines
Inception report	Initial work plan proposal for the delivery of the services, with the possibility to update every 3 months or to introduce amendments if needed.	English	1 month after the start of the contract
Bi-monthly reports	Very brief update on main activities, key achievements, relevant highlights and points of attention.	English	Every month (maximum 4 pages delivered in an electronic format only, on the first working day of each calendar month and with a deadline of two weeks for eventual comments/questions).
Progress report(s)	Description of progress on the activities, problems encountered and proposed solutions, planned activities and recommendations. The report shall follow the standard format used by EU.	English, with an executive summary in English/Spanish	Every year (maximum 20 pages with a short executive summary of no more than 2 pages; to be delivered electronically subject to an acknowledgement of receipt by INTPA B1, and subject to formal approval with the possibility of issuing comments and requesting clarifications; <u>accompanied by an invoice.</u>
Final report	Recapitulation of the main activities and achievements obtained within the framework of the contract, including problems encountered and key recommendations.	English, with an executive summary in English/Spanish	End of the contract (maximum 40 pages with a short executive summary of no more than 2 pages, accompanied by a final invoice and the financial report accompanied by the expenditure verification report).

TENDER SPECIFICATIONS – PART B

BACKGROUND INFORMATION

1. Benefitting Zone

Americas Caribbean

2. Contracting authority

The European Union, represented by the European Commission, B-1049 Brussels, Belgium.

3. Contract language

English

LOCATION AND DURATION

4. Location

- **Key Expert 1 Team leader - Education and Skills :**
 - Normal place of performance of the specific assignment: Brussels
 - Mission(s) outside the normal place of performance and duration(s):
- **Key Expert 2 - Human development: education and health:**
 - Normal place of performance of the specific assignment: Brussels
 - Mission(s) outside the normal place of performance and duration(s):

5. Start date and period of implementation

The indicative start date is 15/01/2025 and the period of implementation of the contract will be 35 Month(s) from this date (indicative end date: 15/12/2027).

REQUIREMENTS

6. Expertise

For this assignment, one individual expert must be proposed for each position.

The expertise required for the implementation of the specific contract is detailed below.

- **Key Expert 1 Team leader - Education and Skills :**
 - General description of the position: Technical assistance to support the strategic needs of the EU-LAC Global Gateway Investment Agenda in the field of human development – notably the strategic priority on inclusive education and skills development -, and to ensure synergies and alignment of the programme actions and general objectives.

- Expert category: Home Based - Cat. II (>6 years of experience)
 - Qualifications and skills required: University degree (Master level) in social sciences, economics, business administration, education and skills development, or a relevant discipline for human development.
 - General professional experience: At least 3 years of professional experience in the field of human development. Good understanding of the EU Global Gateway Strategy. Experience working in social cohesion and inequalities with a gender-responsive approach.
 - Specific professional experience: At least 3 years of professional experience in the field of education and skills development. Experience working with private sector stakeholders or international financial institutions. Experience working in Latin America and the Caribbean will be an asset, especially if linked to resilience and quality of education systems, skills development and TVET, social innovation, social investment mobilisation, etc.
 - Language skills: Fluency in written and spoken English and Spanish is a requirement; knowledge of French and/or Portuguese is considered an advantage.
 - Number of working days: **400** days
- **Key Expert 2 - Human development: education and health:**
 - General description of the position: Technical assistance to support the strategic needs of the EU-LAC Global Gateway Investment Agenda in the field of human development – and to ensure synergies and alignment of the programme actions and general objectives.
 - Expert category: Home Based - Cat. II (>6 years of experience)
 - Qualifications and skills required: University degree (Master level) in social sciences, economics, business administration, education, health or a relevant discipline for human development.
 - General professional experience: At least 3 years of professional experience in the field of human development. Good understanding of the EU Global Gateway Strategy. Experience working in social cohesion, youth and inequalities with a gender-responsive approach.
 - Specific professional experience: At least 3 years of professional experience in the field of human development with a strong experience and background on health and social services. Experience working with private sector stakeholders or international financial institutions in promoting equitable access to health.
 - Language skills: Fluency in written and spoken English and Spanish is a requirement; knowledge of French and/or Portuguese is considered an advantage.
 - Number of working days: **400** days

7. Incidental expenditure

The provision for incidental expenditure covers ancillary and exceptional eligible expenditure incurred under this contract. It cannot be used for costs that should be covered by the contractor as part of its fee rates, as defined above. Its use covers:

The provision for incidental expenditure for this contract is EUR 250000. This amount must be included unchanged in the budget breakdown.

If applicable, see part A of the Terms of Reference for more details on the use of the incidental expenditure.

8. Lump sums

No lump sums provided for in this contract.

9. Expenditure verification

An expenditure verification report is required for interim and final payments.

The provision for expenditure verification covers the fees of the auditor charged with verifying the expenditure of this contract in order for the contracting authority to check that the invoices submitted are due.

Tenderers are required to indicate, in their “Organisation and Methodology”, the name and address of the proposed auditor or audit firm that will be in charge of producing the expenditure verification report(s).

The provision for expenditure verification for this contract is EUR 10000. This amount must be included unchanged in the budget breakdown.

10. Other items defined by Contracting Authority

No other items provided for in this contract.

REPORTS AND DELIVERABLES

11. Reports and deliverables requirements

Title	Content	Language	Submission timing or deadline
Inception report	Initial work plan proposal for the delivery of the services, with the possibility to update every 3 months or to introduce amendments if needed.	English	Within 1 Month(s) After the project start
Bi-monthly reports	Very brief update on main activities,	English	Every 2 Month(s)

Title	Content	Language	Submission timing or deadline
	<p>key achievements, relevant highlights and points of attention (maximum 4 pages delivered in an electronic format only, on the first working day of each calendar month and with a deadline of two weeks for eventual comments/questions).</p>		
<p>Progress report</p>	<p>Description of progress on the activities, problems encountered and proposed solutions, planned activities and recommendations. The report shall follow the standard format used by EU. Executive summary in English/Spanish</p>	<p>English</p>	<p>Every 1 Year(s)</p>
<p>Final report</p>	<p>Recapitulation of the main activities and achievements obtained within the framework of the contract, including problems encountered and key recommendations. Executive summary in English/Spanish. Maximum 40 pages with a short executive summary of no more than 2 pages, accompanied by a final invoice and the financial report accompanied by the expenditure verification report.</p>	<p>English</p>	<p>Within 1 Month(s) After the project end</p>