



ANNEX II: TERMS OF REFERENCE

1. BACKGROUND INFORMATION	2
1.1. Partner country	2
1.2. Contracting Authority	2
1.3. Country background	2
1.4. Current situation in the sector	3
1.5. Related programmes and other donor activities	3
2. OBJECTIVE, PURPOSE & EXPECTED RESULTS	3
2.1. Overall objective	3
2.2. Purpose	4
2.3. Results to be achieved by the Contractor	4
3. ASSUMPTIONS & RISKS	4
3.1. Assumptions underlying the project	4
3.2. Risks	4
4. SCOPE OF THE WORK	4
4.1. General	4
4.2. Specific work	5
4.3. Project management	6
5. LOGISTICS AND TIMING	6
5.1. Location	6
5.2. Start date & Period of implementation of tasks	6
6. REQUIREMENTS	7
6.1. Staff	7
6.2. Office accommodation	7
6.3. Facilities to be provided by the Contractor	7
6.4. Equipment	7
7. REPORTS	8
7.1. Reporting requirements	8
7.2. Submission and approval of reports	8
8. MONITORING AND EVALUATION	8
8.1. Definition of indicators	8
8.2. Special requirements	8

BACKGROUND INFORMATION

1.1. Partner country

The Republic of North Macedonia

1.2. Contracting authority

Municipality of Bitola

COUNTRY BACKGROUND

The cross-border cooperation programme Greece - the former Yugoslav Republic of Macedonia supports regional cooperation between Greece and the Former Yugoslav Republic of Macedonia. The Programme's overall objective is to enhance territorial cohesion by improving living standards and employment opportunities holding respect to the environment and by using the natural resources for upgrading of the tourism product. The Pelagonia Region is among eligible Programme regions, where the Contracting Authority, Municipality of Bitola is located and carries out the regular activities.

The project „Building ENergy EFFiciency Improvement- Benefit“ is supported from the cross-border programme “Interreg IPA Cross-border Cooperation Programme Greece-the former Yugoslav Republic of Macedonia 2014-2020”. The cross-border cooperation is considered essential for successful implementation of the project BENEFIT from the objectives, activities and results, because:

- EE is a key priority within the EU 2020 Strategy and this translates into common EU policies for Member States including those addressing energy-efficiency in buildings (2010/31/EC, 2012/27/EU). To accelerate achievement of strategic targets an integrated approach is needed with coordination between EU/national/regional/local energy policies
- the strengthened CoM for Energy & Climate provides common guidelines to local/regional authorities across Europe for developing SEAPs committing to joint targets of 40% CO2 reduction by 2030
- there are common key challenges identified faced by public administrations in the CB area: Municipality of Bitola has significant expertise in planning and implementing EE improvements in public buildings whereas others have more limited past experience . From the IPA Cross-Border Cooperation Programme Greece - Republic of Macedonia programming period 2007-2013 successfully was implemented the project „Protection of the environment through the promotion of biomass for substitution of fossil fuels in heating and power generation/Biofoss“.
- some EE building materials/technologies
- may be widely used in one country whereas in the other they may be considered innovative
- some public authorities (e.g. Thessaloniki) are already in the process of implementing a local SEAP for the CoM, including actions for public buildings, whereas others (e.g. Bitola) have not adhered yet to the initiative

Considering the above, cross-border cooperation will benefit all participating partners/target groups, as it will allow exchanging/transferring of experiences on methodologies/tools/best practices used in partner territories, sharing lessons learnt, identifying common ways of responding to challenges, supporting authorities with insufficient capacities, eventually leading to more informed and integrated planning, financing and implementation of energy retrofit projects and cost-optimal interventions.

1.3. Current situation in the sector

The Municipality of Bitola is a local public authority with the capacity to influence local/regional/national policies. It has 140 staff 10 of which dedicated to national/EU projects implementation. Also, Municipality of Bitola is owner/occupier of public buildings – including the pilot demonstration buildings and they are responsible for developing/implementing energy-efficiency (EE) policies and action plans for public building stock, have capacities to directly influence public policies in their area of activity. Overall all governance levels are represented (local/regional/national) ensuring wide applicability of project outcomes and uptake at all policy levels. The responsibility of the municipality is to increase the insufficient capacities of public administrations to develop reliable cost-effective EE action plans for the public buildings' stock. The current situation is:

- insufficient level of expertise to apply advanced energy modelling methodologies therefore needing a simpler but reliable decision support system
- difficulty in buildings' energy data collection
- lack of specific methodology to categorise them in typologies
- lack of specific decision-support system for planning energy retrofits

The project „Building ENergy EFficiency Improvement- Benefit“ aims to address all above challenges by undertaking following activities:

- developing and testing an integrated decision-support platform for public authorities to facilitate them in planning, financing, implementing and monitoring public Buildings' Energy-Efficiency (BEE) plans and projects; outputs will provide packaged retrofit solutions of cost-prioritised interventions per building typology, accompanied by energy & cost indicators and suitable financial mechanisms;
- pilot implementation of one demonstration public building energy retrofit project (and study of four bankable projects) per territory, providing a leading example for increasing energy-awareness of the wider society.
- policy uptake and community engagement. The direct involvement of partners in the project who have a multiplier role will ensure wide dissemination-awareness raising of the relevant target groups.

Such an approach goes far beyond current practice in public authorities in the cross-border area which in their majority: i) use generic /statistical indices for calculating energy consumption of their building stock ii) often make uninformed decisions on cost-effectiveness/priorities of building typologies/energy retrofit measures to target iii) have insufficient technical capacities on BEE projects' planning, financing and implementation and monitoring iv) do not have integrated long-term plans for gradual public buildings' renovation.

1.4. Related programmes and other donor activities

N/A

OBJECTIVE, PURPOSE & EXPECTED RESULTS

1.5. Overall objective

The overall objective of the project of which this contract will be a part is as follows:

The overall objective of BENEFIT is to strengthen the capacities of public authorities in the cross-border area of Greece-FYROM towards energy-efficiency (EE) planning for upgrading public buildings' energy performance, as well as to increase energy awareness of the wider society on benefits from EE. An integrated decision-support tool will be introduced to support public authorities in EE planning using a common framework. The foreseen demonstration energy retrofit projects will provide great dissemination-awareness raising opportunities on the benefits from EE (e.g. reducing environmental impact; improving living/working conditions; achieving cost savings). The energy upgrades will lead to growth, jobs creation and new innovative markets. Therefore, BENEFIT's overall objective links to the Programme strategy statement “to enhance territorial cohesion by

improving living standards and employment opportunities, respecting the environment and by using the natural resources for tourism”.

1.6. Purpose

The purposes of this contract are as follows:

- To support Project management in implementation of the project activities
- To provide information's about all project related activities
- To provide assistance in procurement procedures
- To prepare 4 financial reports and one final report.

1.7. Results to be achieved by the contractor

- Project management/assistance and coordination
- Providing information's about all project related activities
- Project assistance in procurement procedures
- Assisting and consulting in project implementation
- Advice at the implementation of activities
- Preparation of 4 financial reports and one final report.

ASSUMPTIONS & RISKS

1.8. Assumptions underlying the project

- Good cooperation between all parties involved in the project
- Constant and timely support from the Project team;

1.9. Risks

- Low level of communication among the project stakeholders
- Failure to comply with the respective deadlines for completion and launching of the tender procedures;

SCOPE OF THE WORK

1.10. General

1.10.1. Description of the assignment

Municipality of Bitola in the frame of the project intend to hire Consultant to support Contracting Authority in the implementation of the project Benefit. The assignment of the present contract is to provide support to the Municipality employees in the coordination and day-to-day management of the project and elaboration of 4 financial progress reports and 1 final report.

TECHNICAL INFORMATION

The contractor should provide assistance to the project management for implementation activities that are part of all work packages described below:

August 2018

Work package 1 Project management and coordination
Work package 2 Communication & Dissemination
Work package 3 Mapping of energy efficiency for public buildings in the cross-border area
Work package 4 Energy efficiency planning for Regions and Municipalities
Work package 5 Pilot Buildings' Energy Efficiency projects implementation in the cross-border area
Work package 6 Energy efficiency planning for Regions and Municipalities

FINANCIAL INFORMATION

The maximum available value of the contract is

- For day to day management 12 x 425 EUR =5100 EUR without VAT
 - For 4 financial and 1 final report 5 x 500 EUR =2500 EUR without VAT
- Total 7.600,00 EUR without VAT.

Payments will be realized on the basis of issued invoice by the contactor, after completing each tasks.

1.10.2. Geographical area to be covered

Pelagonia region

1.10.3. Target groups

N/A

1.11. Specific work

The contractor have to provide support to the Municipality employees in the coordination and day-to-day management of the project and elaboration of 4 (four) financial progress reports and 1 final report.

During the implementation of the project, the contractor will support all the activities related to the project in accordance with project management team.

Work package 1 Project management and coordination

- Project assisting and consulting in implementation of the project activities, preparation of procurement procedures, support staff etc.
- Contractor will prepare 4 financial progress reports, 1 final report, reports for FLC; consulting on using of MIS of IPA CBC programme

Work package 2 Communication & Dissemination

- Review of communication plan
- Consulting about web support
- Consulting for behavior change platform
- Consulting in implementation of events
- Consulting for video and printed promotion materials

Work package 3 Mapping of energy efficiency for public buildings in the cross-border area

- Consulting about local level policies

Work package 4 Energy efficiency planning for Regions and Municipalities

- Development & Management of Buildings Energy Efficiency-BEE Platform (into national language and into English) and collection of data
- Advice at contribution to the development of BEE platform

Work package 5 Pilot Buildings' Energy Efficiency projects implementation in the cross-border

August 2018

Page 5 of 8
The Programme is co-funded
by the European Union
and by National Funds
of the Participating Countries



area

- Providing support about the implementation of the procedures for energy refurbishment
- Providing support about installation of metering equipment in the pilot building in Bitola and monitoring of results.
- Providing support about the evaluation of pilot projects

Work package 6 Energy efficiency planning for Regions and Municipalities

- Providing support about organization of training seminar

The Consultant should support the Contracting Authority in the coordination and day-to-day management of the project

The Consultant should delivery to the Contracting Authority elaboration of the 4 financial progress reports and 1 final report.

1.12. Project management

1.12.1. Responsible body

The Contracting Authority for the contract is Municipality of Bitola

1.12.2. Management structure

The Contracting Authority is Municipality of Bitola, the Republic of North Macedonia and in that capacity, it is responsible to launch the service tender procedure, sign the service contract, authorize payments to the contractor and handle the financial management and control during project implementation.

Project management structure is consist of project manager and 2 project assistants from the Municipality of Bitola.

For the day-to-day management consultancy / assistants for the project Benefit, the project manager will check and confirm the deliveries.

For the elaboration of 4 financial progress reports and 1 final report for the project Benefit, the project manager will check and confirm each of the delivered reports.

1.12.3. Facilities to be provided by the contracting authority and/or other parties

The Contracting Authority will provide all available information and will fully co-operate with the Consultant in order to achieve the best results. Technical information and access to the existing records, any useful information and/or documentation which may be relevant to the performance of the Contract will be provided upon request.

LOGISTICS AND TIMING

1.13. Location

Municipality of Bitola

1.14. Start date & period of implementation of tasks

The intended start date is the date when the contract is sign and the period of implementation of the contract for the day-to-day management will be till the implementation of the project BENFIT.

August 2018



The elaboration of 4 financial progress reports and 1 final report will be during the period of the implementation of the project including the period for delivering final report.

REQUIREMENTS

1.15. Staff

Note that civil servants and other staff of the public administration of the partner country, or of international/regional organisations based in the country, shall only be approved to work as experts if well justified. The justification should be submitted with the tender and shall include information on the added value the expert will bring as well as proof that the expert is seconded or on personal leave.

1.15.1. Key experts

Key expert 1: Team leader

Qualifications and skills

University degree and minimum 3 year experience in fields related to the contract (the tenderer have to provide original or copy of degree and copy of contracts or invoices)

General professional experience

Minimum 3 years professional experience in fields related to this contract.

Specific professional experience

Experience with management activities for implementation of IPA projects in the **past 3 years** (the tenderer have to provide copy of contracts or invoices)

1.15.2. Other experts, support staff & backstopping

CVs for experts other than the key experts should not be submitted in the tender but the tenderer will have to demonstrate in their offer that they have access to experts with the required profiles. The contractor shall select and hire other experts as required according to the needs. The selection procedures used by the contractor to select these other experts shall be transparent, and shall be based on pre-defined criteria, including professional qualifications, language skills and work experience.

The costs for backstopping and support staff, as needed, are considered to be included in the tenderer's financial offer.

1.16. Office accommodation

Office accommodation for each expert working on the contract is to be provided by the contractor.

1.17. Facilities to be provided by the contractor

The contractor shall ensure that experts are adequately supported and equipped. In particular it must ensure that there is sufficient administrative, secretarial and interpreting provision to enable experts to concentrate on their primary responsibilities. It must also transfer funds as necessary to support their work under the contract and to ensure that its employees are paid regularly and in a timely fashion

1.18. Equipment

No equipment is to be purchased on behalf of the contracting authority / partner country as part of this service contract or transferred to the contracting authority / partner country at the end of this contract. Any equipment related to this contract which is to be acquired by the partner country must be purchased by means of a separate supply tender procedure.

REPORTS

1.19. Reporting requirements

The contractor will submit the following reports in English in one original and two copies:

- **Inception Report** of maximum 12 pages to be produced after 10 days from the start of implementation. In the report the contractor shall describe e.g. initial findings, progress in collecting data, any difficulties encountered or expected in addition to the work programme and staff travel. The contractor should proceed with his/her work unless the contracting authority sends comments on the inception report.
- **Interim reports** from the contractor are required for each month and the payments will be realised on the basis of approval of interim reports by the project manager proving that specific objectives have been reached.
- **Draft final report** shall be submitted no later than one month before the end of the period of implementation of tasks.
- **Final report** with the same specifications as the draft final report, incorporating any comments received from the parties on the draft report. The deadline for sending the final report is 10 days after receipt of comments on the draft final report. The report shall contain a sufficiently detailed description of the different options. The detailed analyses underpinning the recommendations will be presented in annexes to the main report. The final report must be provided along with the corresponding invoice.
- **4 (four)** financial progress reports and **1 (one)** final report.

1.20. Submission and approval of reports

The report referred to above must be submitted to the project manager identified in the contract. The project manager is responsible for approving the reports.

MONITORING AND EVALUATION

1.21. Definition of indicators

All activities for monitoring and evaluation which will be a part on this Contract will be realized according the planed time and measures of progress towards expected results.

1.22. Special requirements

N.A.