

PART A: INFORMATION FOR THE TENDERER

Name and address of the contracting authority: Regional Development Agency Srem

Title of the tender: External support in terms of EoE - regional analysis on REC's and project input to territorial context including technical, regulatory, economic, and social aspects in Serbia;

Reference number: REC4EU - 01C0156/TD-002;

Date of launching: 07.10.2024.

1. INFORMATION ON SUBMISSION OF THE TENDERS

Subject of the contract:

The subject of this tender is:

- Implementation of services within REC4EU project, Project ID: 01C0156 as indicated in the technical information in the point 2 of this information;

Deadline for submission of the tenders:

The deadline for submission of tenders is **17.10.2024. at 12.00 o'clock**. Any tender received after this deadline will be automatically rejected.

* - The tenderer should have minimum 7 days from the date of launching of the procurement procedure for preparation of the offer (excluding the day of publishing and the date of submission deadline).

** - The Contracting Authority is obliged to provide answer to all questions received no later than 3 days before the deadline and has to publish them on the same web sites where the tender was published.

Financial information

The tenderers are reminded that the maximum available value of the contract is 1.182.508,00 RSD, including VAT; (€10.100,00; Inforeuro rate October 2024 1€=117,08 RSD).

The Financial offer must be presented as an amount in RSD with VAT included and must be submitted using the template for the global-price version of PART C: FORMAT OF FINANCIAL OFFER.

For this contract VAT is eligible cost.

[In case when the offers are submitted in national currency, the exchange rate to be used for checking financial compliance with available budget (during financial evaluation), shall be InforEuro exchange rate for the month when the tender is launched]

REGIONALNA RAZVOJNA
AGENCIJA SREM DOO
Broj 155-III/24
Datum 07.10. 2024 god.
RUMA

The applicable tax and customs arrangements are specified in the draft contract in Part A of this tender dossier.

Variant solutions

Tenderers are not authorised to tender for a variant in addition to this tender.

Subcontracting

Subcontracting is not allowed.

Award criteria:

In case more than one offer received: best value for money, weighting 80% technical quality, 20% price.

Evaluation criteria for technical offer:

- Organization and methodology: 80 points
 - Proposed inputs: 10 points
 - Time frame: 10 points
- TOTAL: 100 points

In case one offer received: the Contracting Authority shall check whether the offer is administratively, technically and financially compliant with the requirements set by this tender documentation.

Interviews:

No interviews are foreseen.

Award notification:

The successful tenderer will be informed of the results of the evaluation procedure in written form.

Contract award notice will be published on the programme web site. The estimated time of publishing is **7 days** after the date of contract signature.

Address and meanings for submission of the tenders:

The tenderers will submit their tenders using the **standard set of submission forms available in the Part B – Technical offer and the Part C - Financial offer**. Any other document supporting this invitation is sent for informational purposes only and is not to be modified nor submitted by the tenderer. The tender will be submitted in **1 original**. Any tenders not using the prescribed form may be rejected by the contracting authority.

In addition to the offer the tenderer is required to provide the following supporting documentation:

- Copy of legal registration (only if not publicly available from the Serbian Business Register Agency website)
- CV's of Key experts

The tenders will be submitted in sealed envelopes, containing the following information:

- Name and address of the tenderer
- Title of the tender: External support in terms of EoE - regional analysis on REC's and project input to territorial context including technical, regulatory, economic, and social aspects in Serbia
- Reference number: REC4EU - 01C0156/TD-002
- The words: "Not to be opened before the tender opening session" ("Ne otvarati pre sastanka za otvaranje ponuda").

Tenders must be submitted using double envelope system, in an outer parcel or envelope containing two separate, sealed envelopes, one bearing the words "Technical offer"- part B and "Financial offer" - Part C. Any infringement of this rule (e.g. unsealed envelopes or references to price in the technical offer) is to be considered a breach of the rule, and will lead to rejection of the tender.

The tenders will be submitted in person, by post or courier service to the following address:

Regionalna razvojna agencija Srem
Glavna 172
Ruma, 22400

The tenderers are reminded that in order to be eligible the tenders need to be received by the contracting authority by the deadline indicated above.

2. TECHNICAL INFORMATION

The tenderers are required to provide services as indicated below. In the tenderer's technical offer, the tenderers might indicate more details on the deliveries, referring back to the requirements below.

2.1. Title of Activities:

- 1) Permanent support to Discovery partner (RDA Srem) Exchange of Experience towards other Project partners in the term of regional analysis on REC's and project input to territorial context including technical, regulatory, economic and social aspects;
- 2) Identification of „Good practice“ (or aspects of it) regarding REC establishing in Serbia;

- 3) Defining instruments for the policy improvement (Policy and regulations improvement (general initiatives for State level, but with more focus on local (regional) your territory), specifically:
 - a) procedures needed to define / modify relevant policy instruments;
 - b) identifying of the required time and relevant stakeholders; political risks; laws and regulations that could affect implementation of the policy improvement;
 - c) social and cultural risks and mitigating actions; consultations with interested actors; exchange with other REC4EU partner;
 - d) regulation about fund arising campaigns.
- 4) Keeping and up-dating of the Project documents, primarily Country SWOT analysis;
- 5) Participating in other REC4EU activities including Project events' material preparation / participation, etc.
- 6) Other requirements related regional REC context, issued by Contracting authority.

All the aforementioned activities will be particularly intensive during the duration of the first installment of consultant engagement due to project onboarding, initial research, and the establishment of the foundational database. Sve aktivnosti su kontinualne tokom trajanja ugovora I consultant ih sprovodi uz saglasnost I

2.2. Requirements for consultant

Consultant profile

Service concerning this ToR can be rendered by:

- I. legal entity – Limited Liability Company LLC;
- II. Entrepreneurial shop;
- III. Citizen energy cooperatives;
- IV. Individual experts adjoined for Task realisation;

The consultant is obliged to provide 2 (two) experts. Regarding staffing needs, in the case of:

- I. legal entity, at least one expert must be employed in a business entity in the case of an LLC (evidence: permanent employment contract);
- II. Entrepreneurial shop (ES), at least one expert must be ES founder (evidence: founding document of an entrepreneurial shop);
- III. Citizen energy cooperatives at least one expert must be the member of the Management Board (evidence: founding document of the cooperative with the decision of the Management Board appointment);
- IV. Individual experts adjoined for Task realisation (evidence: Mutual agreement on Project engagement with the Statement of availability);

Other experts can be engaged with appropriate documents on cooperation (Contract on engagement, Agreement on cooperation, Statement on joint work and availability on the Project...). In the case of a group of experts, a statement on joint work and availability on the

Project on establishing an info desk on Energy Communities should be submitted for each of the experts.

2.3. Experts:

Key expert 1: Task Manager with proven experience in the field of EE / RES

Key expert 1 will work on the overall task organization as well as on creation of the necessary Task outputs. He / she will be responsible on daily coordination with Contracting Authority and responsible on all task outputs.

Qualifications and skills

- Level of education corresponding to completed academic studies (at least 240 ESTC) in the field of engineering, economy, environmental protection / sustainable development, law, social science...

General professional experience

- At least 5 years of professional experience in the field of EE / RES (primarily solar photovoltaic plants) and / or Cooperative organisation / management and/or public engagement in cooperative;

Specific professional experience:

- Professional experience in the preparation of at least 2 documents regarding RECs (founding acts, financing studies, fund arising concepts or similar). The eventual participation in establishing and functional REC management will be an asset.

Key expert 2: Expert on REC and/or RES/EE context analysing

Key expert 2 will work on the Policy improvement concerning REC organization. He / she will be responsible for context analysing and SWOT analyse tracking in the course of the Project.

Qualifications and skills

- Level of education corresponding to completed academic studies (at least 240 ESTC) in the field of engineering, economy, environmental protection / sustainable development, law, social science...;

General professional experience

- At least 5 years of professional experience in the field of policies' analysing;

Specific professional experience:

- Professional experience in the preparation of at least one REC establishing documentation preparation;

- Experience in conducting at least two regional analyses on RECs and / or RES/EE territorial contexts regarding technical and / or regulatory and / or economic and / or social aspects

Common requirements

- At least one member of the professional team should have the experience in fund raising for the plant building under REC (crowdfunding, vendor financing, state subventions...)

- At least one member of the professional team should have experience in RE power plants planning, erection, grid connection, operation and maintenance, for the least of the one RE Plant (tentatively solar plants)

CVs in English should be attached as evidence of the capacity of the Key experts. The Contracting authority has the right to request additional evidence for each of the items listed in the attached CVs, as well as for company (LLC, entrepreneurial shop RES Cooperative) establishment records and financial company data (annual report (if applicable), bank balance reports and similar)

2.4. Office and equipment

Office space and all the necessary administrative material will be provided by Consultant. No extra costs for this purpose are allowed. Only international travel will be reimbursed by Implementation partner.

2.5. Payment terms

Contracting price will be paid in 5 equal half-year instalments. Except of first instalment which starts in October 2024 and expires in February 2025.

2.6. Delivery and deadlines

Activities will be implemented (delivered) in the period from October 2024 to February 2027. Delivery includes:

1. RECs establishing context in Serbia: technical, regulatory, economic, and social aspects – territorial situation analysis with identification of the common barriers to RECs and tracking of the context changes in the course of Project duration;
2. Issuing / tracking of the SWOT analysis;
3. Proposal of the methodology for REC stakeholders organizing;
4. Good practice identification and presenting in the course of the Project partners exchange of information;
5. Design and proposal of the steps for REC concerned policies improvement at territorial governance;
6. Other deliveries, as needed: reports on review of the documentation, records of direct support to the citizens, working calculations, preparation of Project events', material, participation in events (abroad and in Serbia), etc....

Deadlines for the implementation of activities: February 2027.

3. ADDITIONAL INFORMATION

The unsuccessful/successful tenderers will be informed of the results of the evaluation procedure. In this sense the CA shall send a notification to the successful tenderer and post an

announcement on the website with the name of the successful tenderer followed by the mentioning that “all other tenders were not administratively /technically/ financially compliant”.

Confidentiality

The entire evaluation procedure is confidential, subject to the Contracting Authority’s legislation on access to documents. The Evaluation Committee’s decisions are collective and its deliberations are held in closed session. The members of the Evaluation Committee are bound to secrecy. The evaluation reports and written records are for official use only and may be communicated neither to the tenderers nor to any party other than the Contracting Authority, the European Commission, the European Anti-Fraud Office and the European Court of Auditors.

NOT TO BE FILED IN BEFORE CONTRACT SIGNING
NOT TO BE SUBMITTED WITHIN THE OFFER!!!

FORMAT OF THE CONTRACT BETWEEN THE CONTRACTOR AND THE CONTRACTING AUTHORITY

CONTRACT TITLE: External support in terms of EoE - regional analysis on REC's and project input to territorial context including technical, regulatory, economic, and social aspects in Serbia

REF: REC4EU - 01C0156/TD-002

Concluded between:

Regionalna razvojna agencija Srem, d.o.o. Ruma
Glavna 172, 22400 Ruma
(Contracting Authority)

AND

<Title>

<Address of the contractor>

<Official registration number/VAT number¹>
(Contractor)

Article 1: Subject of the contract

The subject of the contract is the service as indicated in the contractor's offer – 'Part B: Format of offer to be provided by the tenderer'

Article 2: Contract value

The total contract value for implementation of services indicated in the Article 1 is: <XXX,XX RSD with VAT included.

For all Partners:

In accordance with IPA implementing regulation, for all partners VAT can be an eligible expenditure. The Contracting Authority will pay the unit prices, as stated in the Financial Offer, and will pay the VAT if the VAT is eligible and is clearly identified on the invoices.

For this contract VAT is eligible cost.

Article 3: Contracting documents

¹ Where applicable. For individuals, mention their ID card or passport or equivalent document - number

The documents which form the part of this contract are (by the order of precedence):

- Contract agreement
- Contractor’s offer as provided in the tendering phase – ‘‘Part B: Format of offer to be provided by the tenderer’’
- Contractor’s financial offer –‘‘ Part C:Format of financial offer’’
- Any other supporting documentation if applicable (* - in case of asking for registration of company or other information)

For any issues not defined in this contract agreement the rules of General conditions will be applied

B 8d	Draft contract : General conditions (Annex I)	https://wikis.ec.europa.eu/download/attachments/44168995/b8d_annexigc_en.pdf
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[https://wikis.ec.europa.eu/display/ExactExternalWiki/Annexes#Annexes-AnnexesB\(Ch.3\):Servicecontracts](https://wikis.ec.europa.eu/display/ExactExternalWiki/Annexes#Annexes-AnnexesB(Ch.3):Servicecontracts)

Article 4: Deliveries and payments

The contractor will deliver without reservation the services indicated in the contractor’s offer ‘‘Part B: Format of offer to be provided by the tenderer’’. The deliveries will be implemented within the indicated dates.

The contracting authority will pay to the contractor for the services in the amount indicated in the Article 2 of this contract document.

In case the contract is concluded in EUR, and payments are made in National currency, applicable exchange rate must be InforEuro exchange rate for the month of the issuing of invoice or pre-invoice in case of VAT exemption.

The payments will be issued by the following time schedule.

Month		RSD
February, 2025;	First interim payment (*)	<XX % of the contract value / Absolute amount >
August, 2025	Second interim payment (*)	
February, 2026	Third interim Payment (*)	
August 2026	Forth interim payment (*)	

February 2027	Balance final payment	< XX % of the contract value / Absolute amount >
Total		< Total contract value >

* - The contractor will provide contracting authority with the brief report on execution of the services, which will represent the basis for issuing interim and balance final payment

Article 5: Duration of the contract

The duration of the contract is 28 months.
Commencement date is 25.10.2024.

Article 6: Resolving of disputes

Any disputes arising out of or relating to this Contract which cannot be settled otherwise shall be referred to the exclusive jurisdiction of (* Court) in accordance with the national legislation of the state of the Contracting Authority.

For the Contractor

Name:

Title:

Signature:

Date:

For the Contracting Authority

Name:

Title:

Signature:

Date: