

Section IV: Schedule of Requirements

Consultancy services under the “Knowledge for Reform Action in the Western Balkans” Project

1. Background

Under the framework of the multi-year project titled “**Knowledge for Reform Action in the Western Balkans**” UNOPS AUMCO is providing support in the countries of the Western Balkans (Albania, Kosovo¹, Montenegro, North Macedonia, Serbia and Bosnia and Herzegovina) with access to tailored expertise, knowledge and best practice to assist them with advancing their respective reform agenda. Learning and exchanges will be promoted across the region, as well as from neighboring countries which have joined the EU. The project will result in strengthened institutional, administrative and legislative frameworks and practices. To this end, the Project will coordinate with the respective national governments, UN organizations, EU delegations/offices and other development partners, as well as the civil society.

2. Overview of Services required:

The selected organizations will provide Consultancy services for the provision of multi-disciplinary consultancy services related to EU accession negotiation process and EU harmonisation. UNOPS will be part of the experts’ approval processes and will have a right to objection.

UNOPS seeks to establish Long-Term Agreements (LTA) for the provision of multi-disciplinary consultancy services related to EU accession negotiation process and EU harmonisation. Applying technical expertise and professional experience, the Offeror will support UNOPS by provision of the expertise related to EU integration in the Western Balkans region.

The Services referred to this RFP include establishment of multiple vendor LTAs with secondary bidding. Geographical coverage - Western Balkans region (Albania, Kosovo*, Montenegro, North Macedonia, Serbia and Bosnia and Herzegovina. Expected duration of the LTAs 2 years with the possibility of extension if the supplier has shown satisfactory performance and there is a continued requirement for the services.

Task 1. Provision of horizontal support in the target countries of the Western Balkans which may include but not limited to:

- Preparation of powerpoint presentations (i.e. for bilateral screening, explanatory screening);
- Preparatory work to meet potential (opening) benchmarks in selected chapters;
- Awareness of the cluster specific resource involvement;
- Assistance in work on the development of accession negotiation documents;

¹ * All references to Kosovo are made in the context of UNSCR 1244.

- Support for the work of the SAA and negotiation bodies;
- Support for the development of strategic and policy documents, etc.

Task 2. Provision of chapter-specific technical support in the target countries of the Western Balkans which may include but not limited to policy development, law enforcement, policy evaluation, gap analysis, needs assessment, mapping of existing policies, screening development, EU progress monitoring, law alignment to the EU, aligning to IPA programming, by-law development, drafting of relevant terms of references or / and other analytical documents in relation to:

Cluster 2 (Internal market):

- Chapter 1 (Free movement of goods)
- Chapter 6 (Company law)
- Chapter 7 (Intellectual property law)
- Chapter 8 (Competition policy)
- Chapter 9 (Financial services)
- Chapter 28 (Consumer and health protection)

Cluster 3 (Competitiveness and growth):

- Chapter 25 (Science and research)
- Chapter 26 (Education and culture)
- Chapter 29 (Customs union)
- Chapter 20 (Enterprise and industrial policy)
- Chapter 16 (Taxation)
- Chapter 10 (Information society and media)

Cluster 4 (Green agenda and sustainable connectivity):

- Chapter 14 (Transport policy)
- Chapter 15 (Energy)
- Chapter 21 (Trans-European networks)
- Chapter 27 (Environment and climate change)

Cluster 5 (Resources, agriculture and cohesion):

- Chapter 11 (Agriculture and rural development)
- Chapter 12 (Food safety, veterinary and phytosanitary policy)
- Chapter 13 (Fisheries)
- Chapter 22 (Regional policy and coordination of structural instruments)
- Chapter 33 (Financial and budgetary provisions)

3. Target Audience/coverage

The geographical coverage area includes Albania, Kosovo*, North Macedonia, Montenegro, Serbia as well as Bosnia and Herzegovina.

4. Purpose, Scope and Required Services Request for Proposal/services

The purpose of this procurement process is to identify a capable consultancy services provider that can support the project in the below listed activities in the identified countries. The Services referred to this RFP include establishment of multiple vendor LTAs with secondary bidding.

More particularly, the Offeror shall be able to provide the followings:

- Provision of technical expertise / consultancy services (local and international experts) on the EU integration based on the needs of the beneficiary countries and as per the chapters specified in section 2 (proposed methodology),
- Deployment of the chapter-specific expertise in a timely manner (within the period of maximum 4 weeks after the formal request by UNOPS for an expert as per the ToR),
- Provision of relevant technical support in the requested area of expertise,
- Support UNOPS in enhancing the beneficiary country's capacity for EU integration through tailored expertise in EU accession related processes.

Each expert can have one or more areas of expertise:

- EU negotiations under the revised methodology,
- Various Chapters of the EU acquis,
- Networking with the EU institutions,
- Implementation of the EU reform agenda for Western Balkans,
- Establishment of the EU learning platform,
- Preparation of presentations, mock exercises for Bilateral Screening meetings, Explanatory Screening Meetings,
- Provision of initiations and advance preparations to meet potential opening benchmarks,
- Instrument for Pre-accession Assistance (IPA) programming.

Responsibilities of the selected expert:

- Provide technical expertise and advice on EU negotiations to the beneficiaries, including roadmaps and benchmarks,
- Provide assistance with harmonization, approximation and standardization in the line with the enlargement methodology,
- Provide technical expertise and advise on the reforms under various Chapters of the EU acquis,
- Provide assistance with harmonization, approximation and standardization of legislation aligning it with the EU Acquis,
- Provide technical expertise as relevant to the networking with the EU institutions, facilitate the access to the relevant EU institutions,
- Provide technical expertise and advise on the implementation of the EU reform agenda for Western Balkans on a needs based cases,
- Provide technical expertise and advise on the establishment of the EU learning platform,

- Advice on the content of the EU knowledge and learning Platform,
- Develop roadmaps and procedures as relevant EU Acquis Chapters.

Other Tasks and Responsibilities may include:

- Perform analysis of certain EU acquis chapters or clusters,
- Design monitoring and coordination mechanism for the governments as relevant to the EU integration reforms,
- Carry out technical assessments, analysis on the subject matter,
- Draft concept notes, design and develop training and similar in relation to the reforms that beneficiaries are undertaking with the view to the EU integration processes.

5. Deliverables:

The service provider, shall provide UNOPS with the following deliverables, as per agreement and UNOPS' request:

- At the individual expert level:
 - Completed report and any relevant document as specified in the terms of reference of the deployed expert
 - The acceptance of the expert deliverables by the beneficiary, UNOPS and other relevant stakeholders.
- At the organizational level:
 - Quarterly reports on provision of consultancy services including the outcomes of monitoring and evaluation of the performed services to be submitted within five calendar days after end of the period (including number of experts deployed, countries of deployment, financial and narrative information as per the template shared by UNOPS)
 - Annual report on provision of consultancy services including the outcomes of monitoring and evaluation of the performed services to be submitted within 10 calendar days after end of the period (as per the template provided by UNOPS)
 - Final report (first draft) to be submitted 20 calendar days before the contract end date. Revised version of the final report to be submitted within 5 calendar days upon provision of feedback by the Project team/UNOPS.

The service provider shall bear costs related to the translation of the deliverables (from English to local language and vice versa), if and when required.

6. Management of Long Term Agreement

The LTA holder must appoint a “Global Coordinator” under the Agreement, i.e. a focal point which will manage the agreement after the award and be the main representative in all dealings with UNOPS. The Global Coordinator should be responsible for managing the Agreement, in particular in the initial stages, to

ensure appropriate use of the agreement and to maximize and monitor its utilization with a global perspective. The parties will agree to a quarterly review meeting of all activities under the agreement.

The Global Coordinator will perform the following duties:

- Act as a contact and focal point in coordination with UNOPS;
- Receive and coordinate the bids (requests from UNOPS). The LTA holder will submit in response to Requests for Quotation from UNOPS;
- Provide reports to the Project Team as per timeline described in Section 7. Timeline and Payment Schedule.
- Send invoices to UNOPS based on the provided services is further described in section 7. Timeline and Payment Schedule. Invoices need to be submitted directly to the office that requested the services.

The roles and responsibilities of representatives from the selected supplier(s) and UNOPS are outlined below. Roles and responsibilities may be defined in more detail in purchase orders/contracts created for specific projects based on the resulting LTAS(s). However, at a minimum:

The UNOPS Project team will be responsible for:

- Providing a single point of contact for overall LTAS's management (the "Project focal point");
- Providing Service provider with background documentation;
- Developing and providing the terms of reference for the experts;
- UNOPS will maintain direct communication with the beneficiaries about the selected experts and all their engagements with the beneficiaries. High level communication will remain the exclusive domain of UNOPS.
- UNOPS will have final approval of the selected experts' processes and will have a right to object to the proposed expert in consultation with the beneficiary countries (CVs and credentials should be shared for each proposed expert)..
- Providing clarifications of requirements, as needed;
- Providing feedback on deliverables to the vendor such as project documentation quality and completeness;

The selected Supplier will be responsible for:

- Providing a single point of contact for overall LTAS's management (see above for details on the role of the Global Coordinator);
- Ensuring that each project remains within the agreed budget and alert UNOPS's project team if

- there is a need for any scope adjustment;
- Submitting the timeline for each deployment;
- Requesting approval from UNOPS for any changes in the team during the execution of a project with at least 15 days notice;
- Submitting outputs in the format specified for the relevant service and/or project.
- Managing international and national experts on EU integration in accordance with the UN core values and as specified in the contractual agreement of the contract with the selected supplier (s). as per its internal rules and regulations;
- Report on the work of experts against the impact on the reforms related to the EU integration at a request of the project team / UNOPS;
- Report on any challenges encountered, lessons learnt and perform risk assessment at a request of the project team / UNOPS;
- Selected supplier will be obliged to coordinate and get clearance by UNOPS for each agreed activity/deployment as per the work plan.

The bidder should take all reasonable steps to ensure that the implementation of services under this contract is conducted to respect and protect the rights, welfare and privacy of the people and communities involved in and/or affected by the project. Particular attention should be placed on data security, including the collection, processing, and storage of personal or in any other way sensitive information. Actual, potential or perceived conflicts of interest which may jeopardize their independence and impartiality from the part of the evaluation team must be declared to UNOPS to allow the most appropriate course of action to be taken.

7. Timeline and Payment Schedule

	Deliverables	Indicative timeline	Payment
1	Reports on completion of the deployment as per the agreed ToR	15th day of next month	Upon provision of the invoice and acceptance of the deliverable by the beneficiary and the project
2	Quarterly reports (in case of the services delivered during the reporting period)	On 15th of the month following the quarter	N/A
3	Annual report (in case of the services delivered during the reporting period)	20 calendar days after the calendar year end	N/A

4	Final report (in case of the services delivered during the reporting period)	20 calendar days prior contract end date	N/A
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8. Evaluation Considerations/Personnel requirements

The evaluation criteria is further elaborated in Section III. The bidders shall provide CV of key personnel as per below.

The Supplier must provide following Cvs from the existing pool of suggested experts/advisors using the Form I: Format for Resume of Proposed Key Personnel:

- Global Coordinator
- CV of Advisor covering chapters 9
- CV of Advisor covering chapter 14
- CV of Advisor covering chapter 15
- CV of Expert covering chapter 9
- CV of Expert covering chapter 14
- CV of Expert covering chapter 15

Offered personnel must conform to the requirements discussed below:

Advisor

Education: Advanced University Degree in the required field for the relevant chapter, for example, either in Law, International Relations, Public Administration, Management, Developments Studies, Sociology, Political Sciences, Agriculture and Rural Development, Human Rights and Fundamental Freedoms, Employment, Social Inclusion, Environment, Finance or other relevant discipline is required. University Degree (Bachelor's degree / first level) with a combination of five additional years of relevant professional experience may be accepted.

Experience: **At least 7 years of experience** in the relevant field (cluster / chapter) in working for/with the EU institution and/or working for/with the beneficiary countries in EU accession matters is required, with specialization in at least one of the seven areas mentioned above is highly desired.

Expert

Education: Advanced University Degree in the required field for the relevant chapter, for example, either in Law, International Relations, Public Administration, Management, Developments Studies, Sociology, Political

Sciences, Agriculture and Rural Development, Human Rights, Social Sciences, Public Policy, Environment, Finance or other relevant discipline is required. University Degree (Bachelor's degree / first level) with a combination of five additional years of relevant professional experience may be accepted in lieu of the advanced university degree.

Experience: **At least 5 years of experience** in the relevant field (cluster / chapter) in working for/with the EU institution and/or working for/with the beneficiary countries in EU accession matters is required, with specialization in at least one of the seven areas mentioned above is highly desired.

9. Travel

Experts are expected to work in the field (country). International travel as well as intra-country travel are expected. Number of trips per expert will depend on the needs of the assignment and will have to be cleared in advance by the project and will be reimbursed as per actual costs (upon provision of proof related to travel such as (copy of the ticket, invoice, proof of payment, boarding passes). Each travel related arrangement shall be approved by the UNOPS team prior to any type of travel.

All travel must be in line with UNOPS travel related policies, rules and regulations.

Transportation :

Travel of experts shall be in economy class (most direct and most economic option). Transportation costs will be reimbursed based on the actual expenses upon provision of supporting documents (copy of the ticket, invoice, proof of payment, boarding passes).

DSA :

Proposed per diem shall not exceed UN DSA rates ([link](#)).

10. Gender Mainstreaming and Technical Sustainability

UNOPS promotes gender mainstreaming and technical sustainability as core requirements. The service provider must ensure these aspects are integrated in the delivery of Services. UNOPS encourages female participation in the delivery of Services.

11. Bidder's Proposal

When preparing proposals in response to this Request for Proposal, the Bidders must take into account all information provided in the RFP document and prepare and submit a comprehensive submission that will include all document requirements in the RFP. Incomplete submissions (may be rejected consideration). All returnable schedules must be completed in full and supporting documents must be attached.

12. Duration

Duration of LTA: 2 years (with possibility to extend based on the need). Volume of requests for consultancy services provision and experts engagement during this period will depend on the actual demand from the beneficiaries and operational needs of the Project. UNOPS can not guarantee any monthly or annual days of engagement.

13. Ordering Process

The issuance of the Purchase Order will be in response to the result of a secondary bidding exercise. All successful service providers (LTA holders) will be simultaneously invited to participate in the secondary bidding process prior to each technical expert deployment. UNOPS will evaluate all submissions and based on the established criteria (detailed in individual Terms of Reference) select the most cost effective and technically compliant offer. The following describes the typical ordering process:

1. UNOPS will send requests for quotations to the provision of technical expertise (ToR specifying scope of work to be shared by UNOPS). It is expected that suppliers will check relevant experts' availability using their pools of experts and inform UNOPS accordingly.
2. The quotation for services shall be provided in line with the time expressed in the request for quotation email from the UNOPS Project team.
3. The UNOPS Project team shall evaluate the quotations, either accept the quotation or request clarifications or provide a deadline extension. The supplier must ensure that the ceiling prices specified in the LTA have not been exceeded.
4. After clearance from UNOPS and acceptance of the quotation, it is expected to receive confirmation from the supplier within 5 working days.
5. Once agreed and finalized, the Purchase Order (PO) must be approved by the relevant UNOPS authority. No service provision shall commence until the receipt of the duly authorized UNOPS PO.
6. PO may be amended if, at the fulfillment of the terms of the PO, there is a need to extend services provision timelines based on the request from the beneficiaries.

The quantities specified in any Purchase Order entered into under the Long Term Agreement must not be exceeded or decreased without the prior written authorization of UNOPS.

Expected Start Date: 1 October 2023

