

Terms of Reference

Consultancy Services for development of Business and Marketing Plans

I. Background

Considering their shared vision and common understanding upon the role of Local Government Associations (LGA) in the Region, NALAS and the German Development Cooperation have jointly launched the project "Local Leaders in Southeast Europe: Lead for Change – LL SEE".

The project aims at improving the management, leadership and cooperation capacity of municipalities and municipal water and wastewater utilities with a particular emphasis on the improvement of the municipal services and the subsequent capacity to absorb dedicated international funds. To this end, the project will foster exchanges and disseminate modern management standards and norms among municipalities and municipal water and wastewater utilities in the partner countries via the respective associations or networks.

The project will focus on four pilot countries: Bosnia-Herzegovina, Macedonia, Serbia and Croatia. However, all interested NALAS member associations will profit from the results of this project and will be included in the dissemination of the products.

15 municipalities have been selected to pilot and test a series of training measures to be developed under the umbrella of the LL SEE project. Accordingly, the target group of the LL SEE project consists of mayors, head of sections of municipalities, directors and head of departments of Public Utility Companies (PUC).

The project consists of 7 Working Packages, namely:

WP0: Project Start

WP1: Training Needs Assessment Study

WP2: Training Delivery Scheme

WP3: Trainer Pool and Training Package

WP4: Business Plans and Marketing

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WP5: Regional Platform on Water and Wastewater

WP6: National Training Activities

The assignment refers to WP4 aiming at developing a Regional Business and Marketing Plan (RB&MP) as well as National Business and Marketing Plans (NB&MPs) for LL SEE partner countries.

The development of the RB&MP and NB&MPs is based on the findings of WP 2, namely the existing Regional Training Delivery Scheme (RTDS) and the existing National Training Delivery Schemes (NTDSs). In consequences, the RB&MP takes products, modes of delivery, respective roles and responsibilities and governing structure into consideration on regional level. The NB&MPs do so on national level. The business and marketing plans shall foster sustainability of the RTDS and the NTDSs, i.e. proposing marketing activities and pricing of LL SEE products.

Therefore, NALAS invites organizations/companies with relevant experience and expertise to submit proposal for provision of Consultancy Services for development of RB&MP and NB&MPs.

II. Aim of the Assignment

As mentioned above, the development shall be based on the findings of WP2 (namely, the RTDS and the NTDSs).

General objective of the assignment is to develop a RB&MP and 4 NB&MPs.

In this regard, the specific aims of the assignment are two-fold:

- 1) To develop the RB&MP reflecting main elements of the RTDS; and
- 2) To support the development of NB&MPs on national level reflecting the main elements of the NTDSs.

The RTDS as well as NTDSs will be provided to the consultant after signature of the contract.

III. Responsibilities and tasks of the Consultant

Generally, WP4 consists of three sets of activities: 1) a set of preparatory activities referring to the preparations for the RB&MP and NB&MPs, 2) a set of activities referring to the development of the RB&MP, and 3) a set of activities referring to the development of the NB&MPs.

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Three types of experts will be involved in the implementation of WP3:

- a) The so called International Expert for Human Capacity Development (IE),
- b) The so called Regional Expert for the RB&MP (RE), and
- c) The so called National Experts for the NB&MPs (NEs).

The following table provides an overview about the general division of roles and tasks between these experts in the context of the assignment:

Set of activities	IE	RE	NEs
Set of activities 1 (preparatory activities)	Briefing of RE	Familiarisation with findings WP2, elaboration of methodology for the development of RB&MP, briefing of NEs	Familiarisation with findings WP2 and methodology of RB&MP
Set of activities 2 (RB&MP)	Quality Assurance (QA)	Development of RB&MP, compilation of lessons learnt	Familiarisation with findings and process referring to the RB&MP
Set of activities 3 (NB&MPs)	QA, if necessary	Development of Terms of Reference (ToR) for NEs, elaboration of methodology for the development of NB&MPs, coordination of development of NB&MPs, QA	Development of the NB&MPs under supervision of RE

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The specific responsibilities and tasks of the consultant per set of activities are:

Set of activities 1 (preparatory activities)

Preparatory talks: This includes talks with the NALAS staff, host of the NALAS Task Force on Association Development, and the GIZ project staff as well as the briefing by the IE. They refer particularly to clarification of background and target groups, discussion of expectations, roles, tasks and deliverables (i.e. structure of RB&MP), and to coordination regarding time planning.

Study of relevant documents: The desk study includes the careful study of the RTDS and NTDSs (WP2). Relevant documents will be compiled by the GIZ project staff and will be provided to the consultant after contract signature. In addition, the consultant gets familiarised with the GIZ Orientation on Capacity WORKS.

Elaboration of RB&MP methodology: The RE develops a methodology exposing essential elements for the RB&MP development. He/she takes the following aspects in consideration: Cost-benefit analysis, pricing of products, roles and responsibilities as well as governing structure, potential costumers (i.e. international financing institutions), respective marketing strategies. This list is not exhaustive and shall be completed by the RE in the context of the RB&MP methodology. The RB&MP methodology shall be developed in a manner that allows application at national level, too (cf. development of NB&MPs). The methodology has to be endorsed by NALAS and GIZ prior to carrying out set of activities 2.

Briefing of NEs: NEs will be nominated by the LGAs based on the ToR to be developed by the RE (cf. set of activities 3). Ideally, the NEs are representatives of the LGAs. During the course of development RB&MP, RE is responsible to brief NEs enabling them to get familiarised with the findings of WP2 (RTDS, NTDSs) and with the RB&MP methodology to gather first orientation for the development of the NTDSs. The IE might join according briefing meeting on a virtual base, if necessary.

Set of activities 2 (RB&MP)

Development of the RB&MP: Based on the endorsed RB&MP methodology, the RE is fully responsible for the development of the RB&MP. Again, the RE takes the following aspects in consideration: Cost-benefit analysis, pricing of products, roles and responsibilities as well as governing structure, potential costumers (i.e. international financing institutions), in partnership with

respective marketing strategies. This list is not exhaustive and shall be completed by the RE in the context of the RB&MP methodology.

Briefing of NEs: The RE briefs the NEs with regard to the findings, challenges and lessons learnt of the RB&MP development process.

Deliverable: Document of RB&MP (max. 20 pages, including main lessons learnt and a road map for operationalisation of RB&MP, excluding annexes)

Set of activities 3 (NB&MPs)

Development of ToR for NEs: The RE develops the ToR for contracting the NEs. Again, it shall be highlighted that the NEs ideally are representatives of the LGAs ensuring enhancement of LGAs' expertise in this regard. Final decision referring to NEs' nomination and selection will be done by LGAs in coordination with NALAS.

Development of NB&MPs methodology: Ideally, the NB&MPs methodology is the same methodology applied in the context of RB&MP development, but considers the lessons learnt from the RB&MP development process.

Coordination of NB&MPs development: The RE will provide orientation and guidance to the NEs responsible for the development of NB&MPs. He/she does so ensuring that expertise of LGAs are enhanced in this regard. Furthermore, RE assures quality of the NB&MPs documents. They shall follow the structure of the RB&MP document.

Deliverables: 1 Document per NB&MP (max. 10 pages, including a road map for operationalisation of NB&MP, excluding annexes)

Naturally, a lot of communication and coordination loops are required to undertake the assignment and to carry out the above mentioned sets of activities in a aligned manner. Therefore, the Contracting Authority takes flexible communication and coordination for granted. In consequence, meetings (virtual or face2face) are not mentioned in the description referring to the sets of activities, but will take place.

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IV. Deliverables and Time Frame

The following table illustrates the **overall work schedule**:

When?	What?	Who?
July 10th, 2015	Signature of contract	NALAS
Mid of July 2015	Compilation of relevant documents	NALAS/GIZ
Mid of July - End July 2015	Set of activities 1	RE/IE/NALAS/GIZ
August 1st, 2015	ToR for NEs	RE
August 2015	Set of activities 2	IE/RE1
August 31st, 2015	Delivery of RB&MP	
September - October 15th, 2015	Contracting of NEs	LGAs
October - November 2015	Set of activities 3	NEs/RE
November 31st, 2015	Delivery of NB&MPs	NEs/RE
December 2015	WP4 Advisory Board meeting	RE (to be decided)

v. Man days

The following days are agreed upon for the entire assignment: up to 17 working days. According to current planning, these working days are approximately distributed as follows:

Set of activities	Working days
Set of activities 1 (preparatory activities)	3
Set of activities 2 (development of RB&MP)	7
Set of activities 3 (development of NB&MPs)	7
TOTAL	17

The Consultant in the proposal is expected to provide details about working days and potential travels per set of activities.

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VI. Instructions for applicants

To be considered, proposal must be received in electronic form not later than 26 June 2015 (Friday), 16:00 (CET) at info@nalas.eu , with subject: **Offer for consultancy services for development of business and marketing plans.**

a) Proposal

The proposal has to be submitted in English. All pages of the proposal should be consecutively numbered. The proposal should contain the following section:

- Cover page, showing company's name, address and contact information,
- Up to one page Letter of Introduction, signed by an authorised signature,
- Table of Contents, including page numbers,
- Presentation of the company and its suitability for assignment,
- A document for registered activity as evidence that the company is registered as a legal entity for performing the activity related to the subject of the Services or evidence that belongs to appropriate professional association in accordance with the regulations of the country where the company is registered,
- Documents confirming the financial capability of the company,
- Detailed description of understanding of assignment,
- Recommended approach/methodology on how to realise the assignment (explanation of working steps to carry of the above mentioned sets of activities),
- Exposure of Consultant's expertise (description of team, provision of CVs and relevant project references, with references' names and contact details),
- Proposed operational plan (time line, milestones, meetings etc.),
- Proposed man days per set of activities,
- Proposed number of travels, and
- Financial offer that shall contain the total budget for executing of the task. The budget should be presented in details for all activities. The prices should be stated in EUROS (gross amount), VAT shown separately.

The list is not exhaustive; additional sections and further information can be provided by the Consultant.

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It has to be highlighted that the applicant is expected to reflect in the proposal on these ToR and precisely demonstrates a pragmatic and creative approach on how to realise the assignment (e.g. mode of quality assurance, planned time frame, distribution of working days), taking into consideration the above mentioned total number of man days.

b) Staff

For the realisation of the assignment, one Regional Expert is required.

The assignment requires a highly experienced expert combining profound business and marketing planning, water sector/utility management and local government expertise.

The applicant will propose a Regional Expert that fulfils the following requirements:

- Sector competence: 5 years experience within the field of local government and water supply and sanitation.
- Methodological competence: 10 years experience within the field of business and marketing planning to be demonstrated by the development of respective products (at least 5, preferably in the context of local government and /or water sector/utility management.
- Regional competence: 5 years working experience in South-East European countries, preferable in the project countries.
- Language requirements: Fluency in English is required.
- Others: Promptness and high flexibility;
- Working experience in the context of EU accession and integration is an asset.

The RE has a University Degree in an area relevant (e.g. business administration, social sciences, public administration, Water Supply and Sanitation management) to the assignment. He/she can demonstrate gained qualifications with regard to business and marketing planning.

It has to be highlighted that the applicant is expected to precisely demonstrate above mentioned expert profile in the proposal.

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VII. Evaluation Criteria and Scoring

Evaluation of proposals will be undertaken by NALAS Evaluation Committee. The proposals will be evaluated based on the following criteria:

- 35% Company's Capacity: relevance of company's and suggested personnel's (Regional Expert) expertise and experience for fulfilling the tasks under this ToR;
- 25% Technical Offer: proposed approach, solutions, work plan;
- 40% Financial Offer.

VIII. Modification of Terms

NALAS reserves the right to modify the terms of the ToR at any time at its sole discretion.

IX. Consultant Expenses

Consultants are solely responsible for their own expenses in preparing a proposal and for subsequent negotiations with NALAS. Short-listed proposals may be asked to make a presentation to the Evaluation Committee, which will be solely at the Consultants own expense.

X. Acceptance and Rejection of Proposals

NALAS may not necessarily accept the lowest priced proposal or any proposal. At its sole discretion, NALAS reserves the right to reject any or all proposals received and to accept any proposal which it considers advantageous, whether or not it is the lowest priced proposal. NALAS is not under any obligation to award a contract, and reserves the right to terminate the request for proposal process at any time, and to withdraw from discussions with all or any of the Consultants who have responded. NALAS reserves the right to accept the proposed offer in total or in part, to reject any or all offers, to waive any minor informalities, irregularities, or technicalities, and to accept the offer deemed most favourable to the Network.

XI. Contract Negotiation

NALAS reserves the right to negotiate specific terms of the contract with the short-listed proponents prior to the final award of the contract. NALAS also reserves the right to negotiate specific terms of the contract with the Contractor as the contract progresses.

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XII. Reporting

The selected Consultant shall provide a general Work Plan that is to be reviewed and approved by the Project Manager, not later than 5 days after the signing of the contract.

A Final Work Report with all related outputs shall be submitted to the Project Manager for reviewing and approval. The Final Work Report with all related outputs, shall also state observations on problems/risks encountered and recommendations for improvements/additional activities/risks mitigation actions.

XIII. Terms and Payment

The contract between NALAS and selected Consultant will be signed under the Macedonian Laws.

The payment will be based on the actual number of working days (according to the submitted timesheet/s) invested for the development of each deliverable. The payment will be done upon submission and approval of the deliverables listed above, provided and approved timesheet/s and after submission of invoice.

The amount paid shall be gross and inclusive of all associated taxes relevant to the payment. All personal income taxes and other taxes obligatory under the Macedonian Law will be deducted and paid from the overall amount before transferring.

The assignment-related costs (travel and accommodation costs) will be covered by NALAS or reimbursed according to the NALAS reimbursement rules. All travels have to be endorsed by NALAS prior its realisation.

XIV. Reference persons

For any questions about the content of this ToR, please contact Project Manager, Mr. Miodrag Kolić, at kolic@nalas.eu

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