**8**

PRIORITY ACTIONS PROGRAMME REGIONAL ACTIVITY CENTRE

SPLIT, KRAJ SV. IVANA 11

# INVITATION TO TENDER

**PROCUREMENT SUBJECT:** **Tenderer to provide services of preparing the sections on mainstreaming climate change-related adaptation measures related to sustainable tourism, as inputs to the Coastal Management Plan of Boka Kotorska Bay (Montenegro), in the frame of the GEF SCCF Project**

SIMPLE PROCUREMENT

Reference number 8/GEF/2022

Split, May 2022

**1. GENERAL INFORMATION**

**1.1. Client information:**

**Name: Priority Actions Programme Regional Activity Centre – PAP/RAC** (hereinafter: the Client)

**Registered office – address: 21000 Split, Kraj Sv. Ivana 11**

**Personal identification number (PIN): 27788012253**

**Telephone: + 385 21 340470**

**1.2. Contact person:** Questions concerning the tender contents and format can be sent to the person in charge of communicating with Tenderers, Ivan Sekovski, e-mail: [ivan.sekovski@paprac.org](mailto:ivan.sekovski@paprac.org) and paprac@paprac.org.

* 1. **Procurement type:** Simple procurement
  2. **Estimated procurement value:** Procurement value is estimated at 6 000 USD without VAT.

**2. INFORMATION ON THE PROCUREMENT SUBJECT MATTER**

**2.1. Introduction**

The Mediterranean Sea Programme: Enhancing Environmental Security (MedProgramme) is a 43 million USD assortment of seven child projects funded by the Global Environment Facility (GEF) over the 2021-2025 period. It aims to kick start the implementation of priority actions to reduce the major transboundary environmental stresses affecting the Mediterranean Sea and its coastal areas, while strengthening climate resilience and water security and improving the health and livelihoods of coastal populations. This invitation for tenderer to prepare the sections on sustainability of spatial development as inputs to the Coastal Management Plan of Boka Kotorska Bay[[1]](#footnote-1) (Montenegro), with focus on adaptation to climate change impacts, relates in particular to the activities under the GEF MEDProgramme - GEF child project“Enhancing regional climate change adaptation in the Mediterranean Marine and Coastal Areas” (i.e. the SCCF project - GEF ID 9670).

PAP/RAC is an executing partner the SCCF project together with Plan Blue/RAC, GWP-Med, Ministry of Sustainable Development and Tourism of Montenegro and UNEP/MAP (UNEP/MAP is the lead executing agency). The beneficiary countries of the SCCF project are Albania, Algeria, Libya, Montenegro, Morocco and Tunisia.

Entire MedProgramme builds on the GEF MedPartnership and ClimVar & ICZM projects, which enriched the knowledge on the Mediterranean environment and unravelled the implications of climate change and variability; strengthened countries’ mutual trust, cooperation and common purpose; consolidated the partnership among countries, UN bodies, civil society organizations, bilateral donors and the European Union; and tested on the ground the feasibility and effectiveness of technical and policy instruments aimed at addressing major present and future threats to environmental sustainability and climate related impacts.

Activity 2.1. of the SCCF project asks for recommendations for adaptation measures to be mainstreamed into the Coastal Management Plan of Boka Kotorska Bay agreed with the project stakeholders. The Coastal Management Plan for Boka Kotorska Bay should be developed according the ICZM Protocol Article 18, and in synergy with the Activity 1.3.5 of MedProgramme’s Child Programme 2.1. The development of such plan that mainstreams climate change adaptation is identified as one of the priorities in Montenegro’s National ICZM Strategy.

**2.2. Description of the procurement subject matter**

Tasks and activities that are a subject of this procurement consist of the following key components:

* Preparation of the **Diagnostic Analysis Report on sustainable tourism** for Boka Kotorska Bay, with specific focus on impacts of climate change;
* Preparation of the **report on recommendations for future actions** that mainstream climate change adaptation options related to sustainable tourism into coastal management plan for Boka Kotorska Bay;
* the Tenderer is expected to **communicate with the expert team that will prepare other chapters of the Plan,** **local and national experts, institutions, gender expert, and other relevant stakeholders**, for purpose of data collection, integrating local knowledge and other issues relevant for the tasks of this Tender;
* **Participation in project meetings and *Climagine* workshops**.

In more detail:

a) The Diagnostic Analysis Report should contain a rigorous analysis and review of the challenges regarding the sustainable tourism in Boka Kotorska Bay. This theme was recognized by the local and national stakeholders in the Scoping/Climagine meeting, held on 3 December 2021 in Tivat (see Annex 4), as a theme that needs to be covered by the Plan.

Each challenge should be elaborated through:

* **Baseline conditions** and **tourism-related** **pressures** and origins of such pressures in Boka Kotorska Bay. The Diagnostic Analysis on these issues will be based on existing published research[[2]](#footnote-2);
* Alternative views of the future (trends and scenarios) with **specific focus on impacts of climate change on tourism** in the area**.** Apart from the existing literature and strategic documents, data and information on climate change parameters in the area will be provided by the expert team that is preparing the climate risk assessment(coordinated by Plan Bleu/RAC);
* Potential **responses** to such challenges should be drafted (and confirmed and validated in subsequent phases), taking into account the potential future trends of certain pressures, particularly climate change. The **focus should be on responses that will contribute to both mitigation of and adaptation to climate change**, taking into account the risks of maladaptation.;
* Causal cycle that reflects the above-mentioned elements (i.e. baseline conditions, pressures, responses etc.) should be demonstrated by preparing the **Drivers-Pressures-State-Impacts-Response (DPSIR),** or similar **(e.g. Pressures-State Response - PSR)** exercises.
* Propose the selection of **sustainability** **indicators** (see Annex 5) **related to the theme of sustainable tourism** that will help tracking the changes (over time) in certain parameters that reflect the sustainability of Boka Kotorska Bay. Indicators should be selected based on their relevance and their availability. Out of these indicators two priority (i.e. most representative) indicators for the theme will be selected (by the Tenderer) to inform an assessment of overall state of the environment and well-being (together with indicators from other “themes”) in Boka Kotorska Bay. The indicators are supposed to be reviewed and validated by stakeholders and participants at the second *Climagine* workshop to be held in late Q2-Early Q3 of 2022. Based on all these indicators PAP/RAC and Plan Blue/RAC will prepare the AMOEBA diagrams (see Annex 5).

Co-ordination, harmonization and integration of section(s) on sustainability of spatial development into the overall Coastal Management Plan will be carried out by PAP/RAC (consulting the Tenderer).

b.) A report on (policy and technical) recommendations for future actions that mainstream measures of mitigation and adaptation to climate change, related to the sustainability of tourism in Boka Kotorska Bay. In particular, the highlight should be on measures that reduce tourism-related pressures on the environment, especially in summer months, when concentration of tourists is at peak, which increases demands on water/electricity etc. Furthermore, measures related to expanding the season out of summer period, and also to reducing concentration of tourists on the coastline via revitalizing tourism potential in the hinterland, should be in focus (see Annex 4). These measures will help achieving the desired overall future state in the area, with minimized impacts on the environment and maximized societal benefits. In other words, responses to challenges that were drafted in the Diagnostic Analysis Report should be elaborated in greater detail (also taking into account the indicators selected in previous phase – *where are we now and where do we want to be in terms of sustainability?*), again with focusing on solutions that will contribute to mitigation of and adaptation to climate change. Institutional and managerial capacity to implement these options should also be highlighted. Selected potential priority mitigation and adaptation options will serve as a basis for a Cost-Benefit-Analysis (CBA) that will be later conducted by another expert. The Tenderer is expected to collaborate and communicate with the expert that will carry out the CBA.

c.) The Tenderer is expected to communicate with the expert team that will prepare other chapters of the Plan; other local and national experts, government institutions and other relevant stakeholders, for purpose of data collection and other relevant issues concerning sustainable tourism in coastal areas of Boka Kotorska Bay. In addition, the Tenderer is expected to communicate with the gender expert for purpose of mainstreaming the gender-related issues in regard to sustainability aspects of tourism sector and impacts of climate change on this sector, all in context of the Plan;

d.) The tenderer is expected to participate in the team meetings and *Climagine* workshops, and to present his/her contribution to the stakeholders and other experts in at least two *Climagine* workshops (to be held in Montenegro). The number of (other) project meetings will depend on the need – these meetings can also be held in an online manner.

The Project will be implemented based on the Project Cooperation Agreement PCA/2021/Ecosystems Division/4272 between UNEP/MAP and PAP/RAC. The implementation of the activities within this Tender will be funded by the GEF ID 9670. PAP/RAC will guide and supervise the quality of desired outputs of this task.

**2.3. Deliverables and deadlines**

Deliverables:

* + **Deliverable 1** - Diagnostic Analysis Report on sustainability of tourism (including baseline conditions, identification of pressures and challenges, impacts of climate change, initial proposals of responses to the theme-related challenges and impacts of climate change, DPSIR/PSR framework**,** proposal of sustainability indicators that will serve for assessment of the challenges related to the themes)
  + **Deliverable 2** - A report on (policy and technical) recommendations for future actions that mainstream the climate change mitigation and adaptation measures to achieve sustainability of tourism in Boka Kotorska Bay
  + **Deliverable 3 –** brief (2-3 pages) activity report from participation in all project-related consultations, meetings and workshops,

The deliverables and tentative deadlines related to the activities/tasks defined in 2.2 are as follows:

|  |  |
| --- | --- |
| **Deliverables** | **Deadlines** |
| 1. Diagnostic Analysis Report on sustainability of tourism in Boka Kotorska Bay,with proposal of sustainability indicators | 3 October 2022 |
| 2. A report on (policy and technical) recommendations for future actions that mainstream the climate change mitigation and adaptation measures | 28 November 2022 (draft)  27 February 2023 (final) |
| 3. Brief activity report from participation in project meetings and workshops | Up to 15 days after the final meeting/workshop |

The deliverables 1. and 2. should be written **in Montenegrin** while the deliverable 3. needs to be written in English. All deliverables should be submitted in an electronic form (Word form for Windows). Deliverables 1 and 2 should not exceed approx. 40 pages each, and in the case they do so, a brief summary (not longer than 10 pages) should be also provided.

**3. ELIGIBILITY OF ECONOMIC OPERATORS (SELECTION CRITERIA)**

**3.1. Technical and professional capacity**

The Tenderer shall prove it has the following qualifications:

* University degree in environmental, social or economic sciences, preferably with a focus on tourism, relevant for subject of this tender;
* At least 5 years of professional experience in working on the projects relevant to the main activity field of this project - tourism. Working on projects on climate change impacts and/or mitigation/adaptation related to tourism is a strong asset;
* Written and oral fluency in Montenegrin and English

**For the purpose of establishing the grounds set out in item 3.1. of the Invitation to Tender the Tenderer shall submit the following in his Tender:**

* **The Tenderer’s curriculum vitae (CV), clearly highlighting among others, required technical and professional qualifications.**

**4. INFORMATION ON THE TENDER**

**4.1. Tender contents and format**

The Tender proposal should contain the following elements:

* **Tender sheet** signed andfilled in according to this Invitation to Tender (Annex 1);
* **Curriculum vitae** of the Tenderer,proving required technical and professional capacity;
* **List of projects verifying expertise (see chapter 5) of the Tenderer**(Annex 2);
* **Cost statement** signed andfilled in according to this Invitation to Tender (Annex 3);

**4.2. Tender format and submission**

Tender offers need to be drafted according to the requirements laid out in the Invitation to Tender.

Offers shall be sent electronically to the following e-mail addresses: [ivan.sekovski@paprac.org](mailto:ivan.sekovski@paprac.org) and [paprac@paprac.org](mailto:paprac@paprac.org) with “Boka Kotorska Bay\_ Tourism” as the e-mail subject.

**4.3. Date, time and place of tender submission**

Tender offers must be received **by 11 April 2022, 11:00 am CEST (extended to 30 May 2022, 11:00 am CEST).**

All offers received after the bid opening deadline will be marked as late and excluded from the procedure.

* + **The Tenderer may amend or withdraw his Tender before the Tender submission deadline.** The amended Tender shall be submitted in the same manner as the original and clearly marked as amended. The Tenderer may withdraw his Tender by submitting a written statement before the Tender submission deadline. The written statement shall be submitted in the same manner as the original Tender and clearly marked as a statement of Tender withdrawal. Alternative Tenders are not permitted.
  + **Tender currency: US Dollars (USD).**

The Contractor shall express the price in USD, and the payment can be made in USD. However, payment can be made in other currency using the exchange rate of conversion of the Client’s bank ([OTP bank](https://www.otpbanka.hr/)), valid on the date of the payment.

* + **Language and script:** The Tender shall be drafted in English language, using the Latin script.
  + **Period of validity:** 15 days from the tender submission deadline.
  + **Price setting method**

The Tender price shall be expressed in USD. The tender price cannot be altered.

The tender price consists of Pre-Vat price, VAT and total price.

* **Pre-VAT** price includes all costs related to the performance of the services. For natural persons it includes all relevant taxes and contributions in accordance with the Croatian legislation.
* **VAT** needs to be indicated:

-Tenderers registered in Croatia express VAT: 0% if they are not in VAT system and 25 % if they are in VAT system.

- Tenderers outside Croatia (natural persons and companies, in or out of VAT system) do not express VAT, but indicate “reverse charge” (see Annex 1, 3.).

* **Total price** is the sum of pre-VAT price and VAT.

When evaluating the tenders, the Client will take into account the total price.

**5. AWARD CRITERIA**

The Tender will be awarded according to the **most economically advantageous tender (MEAT) criteria**.

The following table sets out the criteria, units of measure, labels and their relative importance. They will be applied to Tenderers who satisfy technical and professional capacity criteria set in chapter 3.1.

The MEAT award criteria are the following:

* proposed price (Annex 3);
* expertise of the Tenderer (Annex 2).

Determining the MEAT according to the above criteria for selecting the MEAT will be done as follows: after the Client has determined the score value by individual criteria for each Tenderer, the points awarded to Tenderer according to each of the criteria will be summed in order to obtain the total number of points for each Tenderer. The most favourable Tenderer will be the one who has earned the highest total score according to all the above criteria.

At that, the MEAT is equal to the highest total score resulting from the ranking of the Tenderers; the total maximum number of points is 100.00 with the total points being calculated in two decimal places. In case that two or more Tenderers achieve equal number of points, the one received earlier will be chosen. As a proof, data will be used on the order in which tenders have been received.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Criteria** | **Criteria label** | **Description and measuring unit** | **Methodology** | **Number of points** | **Maximum** |
| Price | P | The Tender price, i.e. the financial Tender amount in USD including VAT, if applicable | C = (lowest bid price/bid price being evaluated) x 40 | 40 | 40 |
| Expertise | E | Number of projects in Montenegro related to tourism, in which the tenderer was involved as the expert/coordinator | 1 | 10 | 60 |
| 2 | 20 |
| 3 | 30 |
| 4 | 40 |
| 5 or more | 50 |
| Number of projects related to mitigation/adaptation to climate change related to tourism, in which the tenderer was involved as the expert/coordinator | 1 or 2 | 5 |
| 3 or more | 10 |

Selection of the most economically advantageous Tenders (MEAT) will determine the basis for evaluating the criteria for each individual Tender according to the delivery of the requested Tenderer's documentation, in the appropriate form: **MEAT = P + E**.

**For the purposes of establishing the grounds set out in item 5. of the Invitation to Tender the Tenderer shall submit the following in his/her Tender:**

* ***List of projects verifying expertise of the Tenderer*** (Annex 2)*;*

**6. DUE DATE, CONTRACT AND TERMS OF PAYMENT**

The Contract will be made in USD currency. As indicated in ch.4.3. the payment can be made in other currency using the exchange rate of conversion of the Client’s bank ([OTP bank](https://www.otpbanka.hr/)), valid on the date of the payment.

If selected contractor is resident of the Republic of Croatia, payments will be in kuna currency (HRK), using the exchange rate of conversion of the OTP Bank d.o.o. valid on the date of payment.

The Client shall make the payment to the Tenderer in three instalments i.e.:

* 40% upon submission and clearance by PAP/RAC of the deliverable 1.
* 40% upon submission and clearance by PAP/RAC of the deliverable 2.
* 20% upon submission and clearance by PAP/RAC of the deliverable 3.

All legal person (in or our VAT system) and natural person which are in VAT system are required to issue invoice/s.

An advance payment by the Client is not permitted. Envisaged duration of the Contract is 13 months.

**Annex 1**

**Tender sheet**

**Tender date:**

**Contracting Authority**: Priority Actions Programme Regional Activity Centre (PAP/RAC), Kraj Sv. Ivana 11, 21000 Split, Croatia

**Subject of procurement** Tenderer to provide services of preparing the sections on mainstreaming climate change-related adaptation measures related to sustainable tourism, as inputs to the Coastal Management Plan of Boka Kotorska Bay (Montenegro)

**Tenderer information:**

|  |  |
| --- | --- |
| **Tenderer’s name and registered seat** |  |
| **PIN[[3]](#footnote-3)** |  |
| **Bank name** |  |
| **IBAN** |  |
| **SWIFT** |  |
| **The economic operator is VAT registered (select)** | YES NO |
| **Name, family name and position of a person / persons authorised to sign the public procurement contract** |  |
| **Name and title of the contact person:** |  |
| **Mail address:** |  |
| **E-mail address:** |  |
| **Telephone number:** |  |

**Tender price:**

|  |  |
| --- | --- |
| Total pre-VAT price in USD |  |
| VAT (25%)[[4]](#footnote-4) |  |
| Total price with VAT in USD |  |

**Bid validity date:** (at least 15 days after the bid submission deadline)

**For Tenderer:**

# (Signature of the legal representative)

**Annex 2**

**Practical experience verifying expertise of the Tenderer**

Relevant experience of the tenderer- consultant (*Name and Surname*) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, relevant to the main activity fields of this project and in the project area (Montenegro), in which the Tenderer was involved as the expert /coordinator:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| No[[5]](#footnote-5). | Experience (name of the project or other type of engagement related to tourism in Montenegro) | Role of the expert | Name of the client | Year (start-end) |
| 1. |  |  |  |  |
| 2. |  |  |  |  |
| 3. |  |  |  |  |
| 4. |  |  |  |  |
| 5. |  |  |  |  |
| 6. |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| No.[[6]](#footnote-6) | Experience (name of the project or other type of engagement related to mitigation/adaptation to climate change concerning tourism) | Role of the expert | Name of the client | Year (start-end) |
| 1. |  |  |  |  |
| 2. |  |  |  |  |
| 3. |  |  |  |  |
| 4. |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

In\_\_\_\_\_\_, \_\_\_\_\_\_\_ 2022

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Full name of the applicant or legal representative)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Signature of the applicant or legal representative)

**Annex 3**

**Cost statement**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| ***Technical description and cost statement for the tenderer to provide services of preparing the sections on mainstreaming climate change-related adaptation measures related to sustainable tourism, as inputs to the Coastal Management Plan of Boka Kotorska Bay (Montenegro)*** | | | | | |
| **No.** | **Deliverable description** | **Unit** | **Number of units** | **Unit price in USD (without VAT** | **Total item price in USD (without VAT)** |
| 1. | Diagnostic Analysis Report on sustainability of tourism in Boka Kotorska Bay,with proposal of sustainability indicators | Expert days |  |  |  |
| 2. | A report on (policy and technical) recommendations for future actions that mainstream the climate change mitigation and adaptation measures | Expert days |  |  |  |
| 3. | Brief activity report from participation in project meetings and workshops | Expert days |  |  |  |
| ***Total pre-VAT price in USD*** | | | | |  |
| ***VAT amount in USD (25%)*** | | | | |  |
| ***Total price with VAT in USD*** | | | | |  |

In\_\_\_\_\_\_, \_\_\_\_\_\_\_ 2022

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Full name of the legal representative)

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(Signature of the legal representative)

**Annex 4**

**Tourism-related challenges, identified by stakeholders at the Scoping meeting (3 December 2021, Tivat)**

* The problem is seasonality and the pressure of tourists on the narrow coastal belt;
* The grey economy is particularly pronounced in private accommodation;
* Cruising tourism is causing big crowd-congestion in the cities of Boka Kotorska Bay;
* There are no new types of tourism products, except from those based on “sun and sea”;
* There is no destination management;
* There is a need for an extension of the tourist season.
* Different types of tourism should be emphasized, based on the protection of natural and cultural heritage;
* Carrying capacity of all types of touristic destinations should be established;
* Emphasis should be placed on valorizing the hinterland, villages, fortresses and nearby natural areas;
* Cultural events and traditional events should be more included in the tourist offer.
* There are great opportunities for health tourism (tradition, natural/geographical setting and characteristics)

**Annex 5**

***Climagine* methodology and its sustainability indicators**

Between 2013 and 2015, within the framework of the MedPartnership sister ClimVar & ICZM project, Plan Bleu and PAP/RAC developed and tested a participatory method that addresses the specific challenges of climate variability and change in coastal zones in two selected demonstration cases: Croatia and Tunisia. This method, called *"Climagine,"* was developed as an adaptation of *"Imagine"* method developed by Plan Bleu in collaboration with the Bayswater Institute (UK) in the year 2000 to address sustainable coastal zone management needs in the Mediterranean. In brief, *“Climagine”* is the *“Imagine”* method with a climate dimension. It is a framework for local governance to prepare a coastal plan in an integrative way and in a participative manner, taking into account the physical and socioeconomic impacts on coastal environment.

*Climagine* facilitates the shaping of a sustainable development vision and area project by engaging stakeholders through an inclusive process intended to describe, assess and examine the past, present and future levels of sustainability of a local “socio-eco-system” by means of **sustainability indicators**. To sum up, for each challenge defined, the key sustainability indicators should also be defined, with minimum and maximum values to determine thresholds of sustainability. Between the minimum and maximum values is the “range” of sustainability, so-called Band of Equilibrium (BoE). Diagrammatic representation of all indicators compared to this BoE provides a visual image of the “sustainability” of the area at the time in question (so-called AMOEBA or Radar diagrams).

More on sustainability indicators, Band of Equilibrium, AMOEBA diagrams can be found here:

<https://www.researchgate.net/publication/42788413_A_practitioner's_guide_to_'Imagine'_the_systemic_and_prospective_sustainability_analysis>



*An example of the AMOEBA diagram from the Šibenik-Knin coastal plan (the green range is the BoE)*

1. Boka Kotorska Bay here concerns (landward) Herceg Novi, Kotor and Tivat municipalities, together with the marine area extending to 12 nautical miles. [↑](#footnote-ref-1)
2. Relevant plans and strategies of local and national significance are essential to be consulted, such as National tourism strategy for Montenegro, local environmental protection plans of both Kotor and Tivat municipalities, Strategic development plan for Herceg Novi municipality, Management Plan of natural and cultural - historical area of Kotor, National ICZM strategy of Montenegro, CAMP Montenegro, Third national report of Montenegro on climate change, and other relevant documents. [↑](#footnote-ref-2)
3. Or national identification number according to the economic operator’s country of establishment, if applicable [↑](#footnote-ref-3)
4. Economic operators registered in Croatia that are not in VAT system put 0. Economic operators registered outside the Republic of Croatia (natural persons and companies) in or out of VAT system, in the place of VAT put note “reverse charge”. [↑](#footnote-ref-4)
5. Add rows, as necessary [↑](#footnote-ref-5)
6. Add rows, as neccessary [↑](#footnote-ref-6)