



## Open Call for Consulting Services

**Subject:** Common Regional Market Action Plan 2021 – 2024 / Regional Industrial and Innovation Area – Sustainable tourism

**Title:** Technical Support to Mapping and Assessing the Needs of Green and Digital Transformations in Tourism SMEs in the Western Balkans

**RCC Department:** Programme Department

**Eligible:** Individual experts, consulting companies, bidding consortia of individual experts

**Reporting to:** RCC Secretariat

**Duration:** November 2023 – 25 October 2024

**Reference Number:** 057-023

### I. BACKGROUND

In November 2020, the leaders of Western Balkans (WB) – Albania, Bosnia and Herzegovina, Kosovo\*, Montenegro, North Macedonia, and Serbia - endorsed the Common Regional Market (CRM) Action Plan (AP) 2021 – 2024<sup>1</sup> that consists of targeted measures along the four key areas: Regional Trade, Regional Investment, Regional Digital, and Regional Industrial and Innovation Area. The overarching goal of the Regional Industrial and Innovation Area is to transform the industrial sectors and prepare them for the realities of today and challenges of tomorrow. This includes tourism that markedly contributes to the overall sustainability and competitiveness of the region, by fostering eco-friendly practices, reducing environmental impact, and promoting innovation in different sectors of its industry.

In the recent period, several EU actions have been launched in the context of the twin digital and green transition by mobilising European small and medium-sized enterprises (SMEs) across industrial sectors<sup>2,3</sup>. Following the Green and Digital Transformation of the EU SMEs establishment, the RCC has also organised various consultation meetings and conference in support of the Western Balkans' economic development through embracing digital transformation and environmental sustainability

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\* This designation is without prejudice to positions on status, and is in line with UNSCR 1244 and the ICJ Opinion on the Kosovo declaration of independence

<sup>1</sup> [Regional Cooperation Council | Common Regional Market \(rcc.int\)](https://www.rcc.int/)

<sup>2</sup> [https://single-market-economy.ec.europa.eu/smes\\_en](https://single-market-economy.ec.europa.eu/smes_en)

<sup>3</sup> [SME Strategy \(europa.eu\)](https://ec.europa.eu/sme_strategy/)

that applies also to the sector of tourism. From that perspective, effective data sharing concerning tourism policies and services related to sustainability and ecosystem preservation can catalyse development of innovative services, benefiting tourism SMEs and enhancing the region's overall competitiveness as the ultimate outcome.

## **II. DESCRIPTION OF RESPONSIBILITIES**

### **Objective of the assignment**

The objective of this consultancy is to perform an extensive evaluation of tourism SMEs in WB, concerning their progress in embracing green and digital transformation. This process is advancing at a relatively slow pace as the implementation of these measures often involves a certain gestation period while tourism SME's prioritise rapid profit generation. The objective is therefore to provide policy recommendations and tools for smoother tourism SMEs adoption of sustainable practices and technological advancements which is imperative for ensuring the long-term growth of an ever evolving tourism industry.

Therefore, the TA outcomes is to deliver a comparative analysis with exemplary practices within the EU, thereby pinpointing advancements and deficiencies within the region concerning alignment with the EU's legal framework and strategic documents. It will provide proposals relating to policy strategies based on these findings, taking into consideration specificities and tourism trends and developments in the region.

### **Specific Tasks**

This assignment should focus on the following specific tasks:

**Task 1:** Conduct an extensive analysis to map and assess the current state of tourism SMEs while identifying their specific requirements for embracing green and digital transformation. This initiative is geared towards the advancement of competitiveness in the Western Balkans and including, among other things:

- Identifying and mapping relevant examples of tourism SMEs green and digital transformation processes in the region;
- Evaluating gaps and challenges in the digital and green transition of tourism SMEs to enhance competitiveness in the WB region and easier integration into EU value chains;
- Identifying and recommending a system of standardisation and certification related to green and digital transformation, and present process and tools of acquiring them.

**Task 2:** Deliver insights into and recommendations for policy actions within the WB region aimed at enhancing tourism ecosystem and boosting regional competitiveness through tourism SMEs digital and green transformation, including:

- Mapping the existing public policies in the tourism sector that in any way support and empower the green and digital transformation of SMEs, with insights into pertinent policies that are in the process of adoption;

- Prepare proposals for policy tools to support the SMEs sustainable tourism based on insights by TEG and taking into consideration new trends and developments in WB tourism;
- Recommend programmes that foster innovation and technology adoption within SMEs, such as grants, incubators, and partnership with tech firms.

**Task 3:** Provide topical and technical support to the RCC Secretariat in advancing the green and digital transformation agenda of tourism SMEs, including during the TEG meetings by engaging in technical discussions based on the new research findings.

### **Methodology**

The consultancy is expected to propose the best methodological approach for undertaking this task. However, the following guiding principles should be taken into consideration:

- Desk review of primary and secondary sources;
- Communication/interviews/consultations with the representatives of WB economies (relevant institutions, private sector, etc.) and relevant regional and international organisations;
- Any other method applicable.

### **III LOGISTICS AND TIMING**

#### **Timeline**

The engagement is expected to start in November 2023 and end on 25 October 2024. The selected bidder should submit a Gantt chart with a clear overview of planned activities.

#### **Lines of Communication**

- The expert will report to the RCC Secretariat. Upon completion of activities as defined in the timeframe and in accordance with the Terms of Reference, a detailed report will be prepared and sent to the RCC Secretariat for review and approval.
- Meeting with RCC experts will be organised to elaborate further on expectations and deliverables.

### **IV REQUIRED OUTPUTS / REPORTING**

The following deliverables will be produced and transferred to the RCC Secretariat during the course of the assignment, as per the timeframe specified below:

	<b>Deliverables</b>	<b>Due date</b>
1.	Detailed Work Plan agreed with the RCC	First week after contract signature
2.	Inception report	December 2023

3.	Preliminary TA research findings and other work in progress in form of 3 sets of materials with PowerPoint presentations including one pagers with key messages and data ( <b>Task 3</b> )	December 2023 – August 2024
4.	Final Report, including results and findings from <b>Task 1</b> and <b>Task 2</b>	End of October 2024

## V REQUIREMENTS

### Qualifications for consultant/s:

<b>Education:</b>	<ul style="list-style-type: none"> <li>An advanced university degree (Master’s Degree or equivalent) in tourism, economics, public policy, or other field of relevance for the position.</li> </ul>
<b>Experience:</b>	<ul style="list-style-type: none"> <li>Minimum of 5 years of relevant experience in policy advice, research, industrial and tourism development, analysis and/or project implementation in the area, SME support and development or other related policies;</li> <li>Proven professional record of working with international and/or regional organisations;</li> <li>Proven professional record of working on tourism related researches or strategies;</li> <li>Proven analytical skills and ability to conceptualise and write concisely and clearly, preferably evidenced by a list of published reports/articles in English;</li> <li>Proven communication and presentation skills and ability to work in an environment requiring liaison and collaboration with multiple actors including government representatives, international organisations’ representatives, business community, civil society institutions, donors and other stakeholders;</li> <li>Advanced computer skills (MS Office and internet software).</li> </ul>
<b>Language requirements:</b>	<ul style="list-style-type: none"> <li>Fluency in written and spoken English, as the official language of the RCC;</li> <li>Knowledge of other RCC languages is an advantage.</li> </ul>

### Qualifications for Key Expert/s (if relevant):

<b>Education:</b>	<ul style="list-style-type: none"> <li>Master’s Degree (PhD is an advantage) in economics, tourism, public policy or equivalent and relevant to the position.</li> </ul>
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<p><b>Experience:</b></p>	<ul style="list-style-type: none"> <li>▪ Minimum of 5 years of relevant experience in policy advice, research, analysis and/or project implementation in the area of tourism development and promotion, SME support and development (with a focus on tourism) or other related policies;</li> <li>▪ Experience in working with government institutions in developing strategic frameworks, strategies, programmes, and dedicated policies to incentivise tourism, in particular;</li> <li>▪ Proven professional record of working with international and/or regional organisations;</li> <li>▪ Proven analytical skills and ability to conceptualise and write concisely and clearly, evidenced by a list of published reports/articles in English;</li> <li>▪ Proven communication and presentation skills and ability to work in an environment requiring liaison and collaboration with multiple actors including government representatives, international organisations' representatives, businesses, civil society institutions, donors and other stakeholders.</li> </ul>
<p><b>Language requirements:</b></p>	<ul style="list-style-type: none"> <li>▪ Fluency in written and spoken English, as the official language of the RCC;</li> <li>▪ Knowledge of other RCC languages is an advantage.</li> </ul>

**Core Values**

- Demonstrates integrity and fairness by modelling RCC values and ethical standards;
- He/she is independent and free from conflicts of interest in the responsibilities defined by the Terms of Reference;
- Displays cultural, gender, religion, race, nationality and age sensitivity and adaptability.

**Core Competencies**

- Demonstrates professional competence to meet responsibilities and post requirements and is conscientious and efficient in meeting commitments, observing deadlines and achieving results;

- Result-oriented; plans and produces quality results to meet the set goals, generates innovative and practical solutions to challenging situations;
- Communication: Excellent communication skills, including the ability to convey complex concepts and recommendations clearly;
- Team work: Ability to interact, establish and maintain effective working relations in a culturally diverse team;
- Ability to establish and maintain productive partnerships with regional and national partners and stakeholders.

The expert should ensure an internal quality control during the implementing and reporting phase of the assignment. The quality control should ensure that the draft reports and deliverables comply with the above requirements and meet adequate quality standards before sending them to stakeholders for comments. The quality control should ensure consistency and coherence between findings, conclusions and recommendations. It should also ensure that findings reported are duly substantiated and that conclusions are supported by relevant judgment criteria.

The views expressed in the report will be those of the contractor and will not necessarily reflect those of the Regional Cooperation Council. Therefore, a standard disclaimer reflecting this will be included in the reports. In this regard, the expert may or may not accept comments and/or proposals for changes received during the above consultation process. However, when comments/proposals for changes are not agreed by the expert, he/she should clearly explain the reasons for his/her final decision in a comments table.

## **VI. APPLICATION RULES**

The application needs to contain the following:

- Technical Offer;
- Financial Offer.

### **Technical Offer**

#### **For individual consultants:**

- CV of an expert, outlining relevant knowledge and experience as described in the Terms of References, along with contact details of referees;
- An outline work programme of a maximum of 5 pages describing the main issues, sources of information to be used, timeline and methodology. The work programme should include the initial outline of the content of the assessment;
- List of references for relevant activities implemented over the past years demonstrating relevant experience in the subject matter;
- Application Submission Form (Annex I).

**For companies and consortia of individual consultants:**

- Company profile including a brief description (up to 2 pages) of the company. In case of a bidding consortium, the team leader should submit the profile of the consortium;
- Copy of Company's Registration Certificate (in case of consulting companies);
- In case of bidding consortia of individual consultants participating in this Call, they must indicate the members and show how the work is divided between them. Specifically, all members must name the team leader and authorise this member to represent the consortium and receive payments on behalf of the other members. A corresponding written authorisation, power of attorney must be attached to the bid;
- Financial records - company's balance sheet and profit-and-loss statement for the past 2 years (only in case of a bidding of consulting companies);
- CV of an expert(s), outlining relevant knowledge and experience as described in the Terms of References, along with contact details of referees;
- An outline work programme of a maximum of 5 pages describing the main issues, sources of information to be used, timeline and methodology. The work programme should include the initial outline of the content of the assessment;
- List of references for relevant activities implemented over the past years demonstrating relevant experience in the subject matter;
- Application Submission Form (Annex I);
- Signed Statements of Availability (Annex II).

**Financial Offer** (Free format)

The financial offer should reflect the following:

- All figures should be expressed in EUR;
- Maximum budget should not exceed EUR 30,000

NOTE:

**Please make sure that the application is submitted in two separate folders one containing Technical Offer and the other Financial Offer.**

**The documents should be submitted in a form of copies of the originals. Maximum size of the email should not exceed 15MB. WeTransfer alternative is recommended. Please avoid RAR files.**

**Applications need to be submitted via e-mail to [ProcurementforRcc@rcc.int](mailto:ProcurementforRcc@rcc.int) by 20 November 2023.**

## VII EVALUATION RULES

The assignments will be awarded to the highest qualified applicant based on the skills, expertise, and the quality of the concept note(s) and the cost-effectiveness of the financial offer.

Applications will be evaluated on the basis of the profile and competencies of the candidate and the responsiveness to the Terms of Reference for consulting services.

The best value for money is established by weighing technical quality against price on an 80/20 basis.

The applications are evaluated following these criteria:

<b>EVALUATION GRID</b>	<b>Maximum Score</b>
<b>A. Technical Offer (A.1+A.2+A.3)</b>	<b>100</b>
<b>A.1. Work experience, references list:</b> Relevant work experience; evidence of other contracts of the nature comparable to that of the Call; experience with clients comparable to the Contracting Authority.	<b>35</b>
<b>A.2. Quality and professional capacity of the consultants:</b> CV satisfies the criteria set forth in the ToR, education and experience demonstrates professional capacity and experience required.	<b>35</b>
<b>A.3 Quality of the Work Plan</b> Work plan outlining proposed action by the consultant, sources of information to be used, timeline and tools to be employed by the consultant;	<b>30</b>
<b>B. Financial Proposal/ lowest price has maximum score</b>	<b>100</b>

**Score for offer X =**

**A: [Total quality score (out of 100) of offer X / 100] \* 80**

**B: [Lowest price / price of offer X] \* 20**

**In addition to the results of the technical and financial evaluation, a competency-based interview will be held with the selected bidder.**

**Information on selection of the most favourable bidder**

The RCC Secretariat shall inform candidates and bidders of decisions reached concerning the award of the contract as soon as possible, including the grounds for any decision not to award a contract for which there has been competitive tendering or to recommence the procedure.

Standard letter of thanks for participation to unsuccessful bidders shall be sent within 15 days after the contract is signed with the awarded bidder.

The candidates and bidders wishing to receive feedback may send a request within 15 days after receipt of the standard letter of thanks.

The request may be sent to the e-mail address [ProcurementforRcc@rcc.int](mailto:ProcurementforRcc@rcc.int) or to the address of the RCC Secretariat:

Regional Cooperation Council Secretariat  
Attention to: Administration Department  
Building of the Friendship between Greece and Bosnia and Herzegovina  
Trg Bosne i Hercegovine 1/V  
71000 Sarajevo  
Bosnia and Herzegovina

### **Appeals procedure**

Bidders believing that they have been harmed by an error or irregularity during the award process may petition the RCC Secretariat directly. The RCC Secretariat must reply within 15 days of receipt of the appeal.

The appeal request may be sent to the e-mail address [ProcurementforRcc@rcc.int](mailto:ProcurementforRcc@rcc.int) or to the address of the RCC Secretariat:

Regional Cooperation Council Secretariat  
Attention to: Administration Department  
Building of the Friendship between Greece and Bosnia and Herzegovina  
Trg Bosne i Hercegovine 1/V  
71000 Sarajevo  
Bosnia and Herzegovina

**ANNEX I:**

**APPLICATION SUBMISSION FORM**

**REF: 057-023**

**Open Call for Consultancy Services**

**Technical Support to Mapping and Assessing the Needs of Green and Digital Transformations in Tourism SMEs in the Western Balkans**

Subject: **One signed copy** of this Application Submission Form must be supplied.

1 SUBMITTED by:

	Name(s) and address(es) of the bidder submitting this tender
Full Company Name or Name of the legal entity/ individual consultant	

2 CONTACT PERSON (for this Call)

Name	
Surname	
Address	
Telephone	
Fax	
e-mail	

3 **DECLARATION**

[Company Name or Name of the Individual Consultant] \_\_\_\_\_ hereby declares that we have examined and accepted without reserve or restriction the entire contents of the Open Call for Consultancy.

And we are not in one of the following situations:

- (a) Bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;

- (b) Have been convicted of an offence concerning their professional conduct by a judgment which has the force of res judicata;
- (c) Have been guilty of grave professional misconduct proven by any means which the Contracting Authority can justify;
- (d) Have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the Contracting Authority or those of the country where the contract is to be performed;
- (e) Have been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity.
- (f) Are civil servants or other agents of the public administration of the RCC Participants, regardless of the administrative situation, excluding us from being recruited as experts in contracts financed by the RCC Secretariat.

We offer to provide the services requested in the open call for consultancy on the basis of supplied documentation subject of this call, which comprise our technical offer and our financial offer.

Name and Surname	
Signature	
Date	

