



SERVICE CONTRACT NOTICE
National Municipal Strategic Planning Lead Expert

1. Reference

TF-MADAD/2018/T04.136

2. Procedure

Competitive negotiated

3. Programme title

Dealing with Displacement – resilient subnational government in communities in the region affected by the Syrian crisis

Madad EU Regional Trust Fund in Response to the Syrian crisis

4. Financing

TF-MADAD

5. Contracting Authority

For indirect management: Agència Catalana de Cooperació al Desenvolupament

Nationality: Spanish

CONTRACT SPECIFICATION

6. Nature of contract

Based on price.

7. Contract description

The *Agència Catalana de Cooperació al Desenvolupament*, through a consortium led by the Dutch organization of municipalities VNG, is participating in the MASAR project, a project funded by the European Union focused in the areas affected by the Syrian crisis.

The consortium of the European partners agreed that ACCD would focus its intervention in Lebanon, more specifically in the coastal plain north of Tripoli.

MASAR project is being implemented by a consortium of European entities: VNG International (the association of municipalities of the Netherlands), the Polish Center for International Aid (Polish acronym PCPM), the Catalan Agency for Development Cooperation (Catalan acronym ACCD), and Local Government Denmark (Danish acronym KL).

ACCD is implementing a pilot project to capacitate local governments in Area-Based Planning by combining integrated strategic planning and the establishment of municipal GIS systems with updated cartography and digital database.

- This project aims to:





1. Strengthen the resilience and the capacities of the UoMs in dealing with an uncertain environment (notably the protracted displacement crisis), identifying and planning for different scenarios.
2. Deepen the understanding and learning on participatory strategic planning as a mechanism to enhance accountability, good governance and trust between institutions and the citizenry.
3. Define the basis for a long-term local development strategy with a multi-sectorial, multi-stakeholder approach, considering different scenarios for the future that serves to attract projects and investments.

The strategic planning process should be conceived as a learning-by-doing exercise in which capacity building in good governance, participatory decision making or urban planning is an integral part.

The overall objective, therefore, of the strategic planning process is to strengthen good governance practices and democratic values both in the institutions and in the community. Creating a culture of community engagement, transparency and confidence in participation is at the same a means and an end in itself. The success of this intervention depends entirely on the local governments' ownership of the planning process and the resulting strategy. The expert will therefore act as coach/facilitator encouraging stakeholders' leadership.

- Main activities to develop:

To achieve the expected results, the expert will conduct the following activities organised into 7 outputs.

Output 1: Presentation and desk review

- Conduct introductory workshop with municipalities to present the key concepts of strategic planning and participatory process. Gather needs and preferences.
- Identify key stakeholders for both UoM (community leaders, local NGOs, ensuring representation of Syrian community) and conduct initial consultations. Provide a stakeholders mapping for the strategic planning cycle.
- In-depth desk review of MASAR background documents, 5C toolkit, scenario planning and municipal strategic planning reports
- Draft a report providing an update of "Union profiles" produced by MASAR in mid-2019, particularly in view of socio-economic situation, security, national governance crisis and financial crisis.
- Consult with other short-term experts working for MASAR in assessment/implementation of pilot projects: GIS, solid waste, canal infrastructure, road safety.

Output 2: Training Needs Assessment (TNA)





- Assess training needs related to participatory strategic planning at 3 levels of participation: 1) mayors and council members (participatory decision-making, good governance principles...); 2) municipal staff and volunteers; 3) selected stakeholders (community leaders, NGOs, business sector, education sector)
- Propose a training curriculum to be integrated into the strategic planning process in a learning-by-doing approach
- Identify the need of additional short-term experts in specialised thematic areas relevant for the strategic planning process such as scenario planning or public policy cycle. Provide a preliminary draft of their ToR.

Output 3: Full action plan of the strategic planning process

- Having conducted a thorough desk review, consultations and training needs assessment, the expert will produce a detailed action plan of the strategic planning process containing (at least):
 - o governance structure
 - o phases with timeline
 - o methodology
 - o resources
 - o key stakeholders at different levels

Output 4: Governance structure and committees

- Set up the governance structure: steering committee (mayors), thematic working groups (urban planning, infrastructure, services, economic development...), technical committee and public forum.
- Facilitate sessions of working groups and establish objectives, designate focal points and work methodology, including feedback to technical and steering committees.
- Document meetings and progress in monthly reports.

Output 5: Workshops and on-job trainings

- Facilitate workshops with municipal members, staff and stakeholders on strategic planning and participatory decision-making covering the following:
 - o Mapping risks and resources, PESTL and SWOT analysis
 - o Territorial scenario planning: long-term vision of the area (in connection with GIS technical unit)
 - o Defining mission, vision and action plan for the UoM
- Conduct training sessions as per the training needs assessment
- Facilitate public hearings (town-hall meetings) as public reporting mechanism on the elaboration of the strategic plan
- Take into consideration MASAR pilot projects in service delivery and local economic development when defining short-, mid- and long-term priorities.





Output 6: Strategy formulation

- Compile the conclusions of the working groups, committees and consultations in a final strategic plan
- Final document shall include: territory identity and urban policy of the UoM, definition of the priority action lines with key indicators for achievement, identify the different prioritized projects, develop a budget, recommend a implementation mechanism and public feedback.
- Organise a public presentation with local stakeholders, regional/national authorities and international development partners.

Output 7: Final report

- Besides the deliverables mentioned in the next section, the expert shall submit monthly progress reports which will include as annexes any document produced (training materials, questionnaires, meeting minutes, and so on).
- For every meeting/workshop, the expert shall submit a short report and be responsible of collecting participant attendance sheets and other forms – templates to be provided by MASAR.
- Challenges or obstacles of any nature shall be communicated to the FO in writing in the shortest delay.
- At the end of the consultancy, the expert shall submit a full report of the strategic planning process, with analysis on the learnings, stakeholder dynamics, conclusions and recommendations for public advocacy.

8. Number and titles of lots

One lot only, defined in the Terms of Reference:

9. Maximum budget

EUR: 40.000 EUR

CONDITIONS OF PARTICIPATION

10. Eligibility

Participation is open to all natural persons who are nationals of and legal persons [participating either individually or in a grouping (consortium) of tenderers] which are effectively established in a Member State of the European Union or in a eligible country or territory as defined under the Regulation (EU) N°236/2014 establishing common rules and procedures for the implementation of the Union's instruments for external action (CIR) for the applicable Instrument under which the contract is financed (see also heading 22 below). Participation is also open to international organisations.

11. Number of tenders





No more than one tender can be submitted by a natural or legal person whatever the form of participation (as an individual legal entity or as leader or member of a consortium submitting a tender). In the event that a natural or legal person submits more than one tender, all tenders in which that person has participated will be excluded.

12. Grounds for exclusion

As part of the tender, tenderers must submit a signed declaration, included in the tender form, to the effect that they are not in any of the exclusion situations listed in Section 2.3.3. of the Practical Guide.

13. Sub-contracting

Subcontracting is allowed.

PROVISIONAL TIMETABLE

14. Provisional commencement date of the contract

20 April of 2021

15. Implementation period of the tasks

22 weeks (TBD by Contractor)

SELECTION AND AWARD CRITERIA

16. Selection criteria

The following selection criteria will be applied to the tenderers. In the case of tenders submitted by a consortium, these selection criteria will be applied to the consortium as a whole. if not specified otherwise. The selection criteria will not be applied to natural persons and single-member companies when they are sub-contractors.

1) Economic and financial capacity of the tenderer

The average annual turnover of the tenderer must be higher to this contract's value, i.e, 40.000 Euros.

2) Professional and Technical capacity of the tenderer

The tenderer shall meet the following educational and professional qualifications of the person responsible for the execution of the contract. Criteria:

➤ Education:

- Higher education degree (Masters level) in strategic planning, urban planning, political sciences, economics, development or similar.
- Postgraduate studies in local governance and participatory processes will be an asset

➤ Professional Experience:

- Minimum of 8 years of experience in strategic planning and development.





- Minimum of 5 years of experience working with local governments in North Lebanon and Akkar
- Extensive knowledge of Lebanese municipal context and development processes and institutions.
- Proficiency in report writing, case studies, and other related documentation.
- Having conducted at least two similar consultancies preferably in Lebanon
- Experience in teaching, training for local governments will be valued.
- Cultural sensitivity and cross-cultural skills (religion, ethnicity, gender).
- Experience in conducting training and preparation of training materials/ curriculum.
- Proficiency in English and Arabic

➤ **Competencies**

- Autonomy, creativity, pragmatism, and orientation towards results;
- Reliability: fulfilling obligations in a highly responsible manner;
- Self-Control and maintaining composure;
- Cultural sensitivity and cross-cultural skills (religion, ethnicity, gender);
- Attention to details, proper information management;
- Tolerance and adaptability.

It will be necessary to prove that there has been a minimum of 3 similar contracts in the last five years with an annual amount of at least 25.000 Euros.

This means that the project the tenderer refers to could have been started or completed at any time during the indicated period but it does not necessarily have to be started and completed during that period, nor implemented during the entire period.

Candidates/tenderers are allowed to refer either to projects completed within the reference period (although started earlier) or to projects not yet completed. In the first case the project will be considered in its whole if proper evidence of performance is provided (statement or certificate from the entity which awarded the contract, proof of final payment for services). In case of projects still on-going only the portion satisfactorily completed during the reference period although started earlier will be taken into consideration. This portion will have to be supported by documentary evidence (similarly to projects completed) also detailing its value. If a tenderer has implemented the project in a consortium, the percentage that the tenderer has successfully completed must be clear from the documentary evidence, together with a description of the nature of the services provided if the selection criteria relating to the pertinence of the experience have been used.





Previous experience which would have led to breach of contract and termination by a Contracting Authority shall not be used as reference. This is also applicable concerning the previous experience of experts required under a fee-based service contract.

An economic operator may, where appropriate and for a particular contract, rely on the capacities of other entities, regardless of the legal nature of the links which it has with them. It must in that case prove to the Contracting Authority that it will have at its disposal the resources necessary for performance of the contract, for example by producing a commitment on the part of those entities to place those resources at its disposal. Such entities, for instance the parent company of the economic operator, must respect the same rules of eligibility - notably that of nationality - and must fulfil the same relevant selection criteria as the economic operator. With regard to technical and professional criteria, an economic operator may only rely on the capacities of other entities where the latter will perform the works or services for which these capacities are required. With regard to economic and financial criteria, the entities upon whose capacity the tenderer relies, become jointly and severally liable for the performance of the contract.

17. Award criteria

Best price-quality ratio.

TENDERING

18. Deadline for receipt of tenders

The deadline for receipt of tenders is specified in point 8 of the Instruction to Tenderers.

19. Tender format and details to be provided

Tenders must be submitted using the standard tender form for Competitive Negotiated Procedures, the format and instructions of which must be strictly observed. The tender form is available from the following Internet address:

<http://ec.europa.eu/europeaid/prag/annexes.do?group=B> , under the zip file called Simplified Tender dossier.

The tender must be accompanied by a declaration of honour on exclusion and selection criteria using the template available from the following Internet address:

<http://ec.europa.eu/europeaid/prag/annexes.do?chapterTitleCode=A>

Any additional documentation (brochure, letter, etc.) sent with a tender will not be taken into consideration.

20. How tenders may be submitted

Tenders must be submitted in English exclusively to the Contracting Authority, using the means specified in point 8 of the Instructions to Tenderers.

Tenders submitted by any other means will not be considered.

By submitting a tender tenderers accept to receive notification of the outcome of the procedure by electronic means.

21. Alteration or withdrawal of tenders





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Tenderers may alter or withdraw their tenders by written notification prior to the deadline for submission of tenders. No tender may be altered after this deadline.

Any such notification of alteration or withdrawal shall be prepared and submitted in accordance with point 8 of the Instructions to Tenderers. The outer envelope (and the relevant inner envelope if used) must be marked 'Alteration' or 'Withdrawal' as appropriate.

22. Operational language

All written communications for this tender procedure and contract must be in English.

23. Legal basis

Regulation (EU) N°236/2014 of the European Parliament and of the Council of 11 March 2014 laying down common rules and procedures for the implementation of the Union's instruments for financing external action and EUTF.

Director

Agència Catalana de Cooperació al Desenvolupament



**Generalitat
de Catalunya**