**TERMS OF REFERENCE AND SCOPE OF ACTIVITIES**

**SOCIAL EXPERT FOR**

**SERBIA SCALING UP RESIDENTIAL CLEAN ENERGY (SURCE) PROJECT**

## Background

The Government of the Republic of Serbia (GoS) has secured financing from the International Bank for Reconstruction and Development (IBRD), which is part of the World Bank Group, to implement the Serbia ‘Scaling Up Residential Clean Energy’ (SURCE) Project, hereinafter “The Project”. The development objective of the Project is to increase the uptake of energy efficiency (EE), sustainable heating, and rooftop solar photovoltaics (RSPV) by households in participating local self-government units (LSGUs) in Serbia. An important associated objective is to reduce greenhouse gas (GHG) emissions and improve air quality thanks to achieved energy savings and reduced use of solid fuels for heating. These objectives will be achieved by two project components:

* Component 1: Financing Energy Efficiency, Sustainable Heating, and Rooftop Solar Investments in Residential Buildings, with a key focus on single-family houses (SFHs).
* Component 2: Technical Assistance and Implementation Support, with the overall aim of supporting the development of scalable financing mechanisms and removing market barriers, with three subcomponents: (a) enhancing local market capacity, improving enabling environment, and strengthening public awareness; (b) technical studies informing program design and implementation; and (c) project implementation support.

Components 1 and 2 will be implemented simultaneously; together they represent USD 50 million with Component 1 being allocated the major share of loan proceeds. Investments will be financed under Component 1 and scaled up relying on the analytical insights, institutional structures, and financing mechanisms developed under Component 2. The Ministry of Mining and Energy (MoME) might provide additional funds from the government budget to expand the scope of the investments.

The Project will scale up a revised version of an existing government program, piloted in 2021, financing residential EE investments through a combination of public grants and leveraged private-sector financing. The investments under Component 1 will be financed through: (a) partial grants financed through the Project, offered by the MoME and channeled through participating local self-governing units (LSGUs); (b) partial grants offered by the LSGUs directly, in parallel with the IBRD financing channeled through the Project; and (c) household contributions, financed either from savings or borrowings (Figure 1).

**Figure 1. Structure of the Project, with the LSGU playing a pivotal role and the citizen required to pay a share of the investment**



*Notes:* MoME: Ministry of Mining and Energy; SFH: single-family house; LSGU: Local self-government unit.

*Source:* World Bank staff.

The Project became effective in December 2022 and will be implemented over a 5-year period until November 2027. The overall responsibility for the implementation of the Project rests with the Government of Serbia, with the MoME acting as implementing entity. The MoME will establish a Project Implementation Unit (PIU) to carry out the day-to-day activities of Project implementation. The PIU will coordinate closely with the MoME as well as the World Bank energy and E&S teams responsible for the Project implementation and E&S performance. SURCE implementation will be also facilitated by the Administration for Energy Efficiency Financing and Promotion (hereinafter Energy Efficiency Administration, EEA) which has a coordinating role for clean energy and energy efficiency programs across government.

***E&S aspects of the Project***

The Project will comply with the World Bank’s **Environmental and Social Framework (ESF)** requirements. The **Environmental and Social Management Framework (ESMF)** has been prepared by the MoME as the main guiding document to ensure the Project implementation alignement with the E&S requirements This document specifies the legislative and regulatory framework, procedures, and institutional responsibilities and will guide identification and proper management of adverse impacts and risks during project implementatation. The ESMF also sets forth a screening mechanism to ensure that substantial or high-risk activities are not financed under the project. The ESMF ensures that **site-specific** **Environmental and Social Management Plans (ESMPs) or an ESMP checklist** will be prepared for subproject activities and will include site-specific impacts and mitigation measures, with clearly defined procedures for screening, mitigation, implementation, monitoring, and responsibility roles. The ESMF also includes provisions for the avoidance of any sensitive environments or protected areas, guidance for pollution prevention and environmentally sound resource use under ESS 3, and any guidance on cultural heritage or chance finds as stipulated under ESS 8. The ESMF, along with a template of a screening procedure, has been reviewed by the Bank team. All relevant ESF documentation was disclosed on January 19, 2022 on the Ministry of Mines and Energy website[[1]](#footnote-2) and a public consultation process was concluded on February 3, 2022; a report summarizing the results of the consultations was included in the final ESMF document. In addition to the ESMF, the MoME and other relevant stakeholders will implement the activities listed in the Environmental and Social Commitment Plan (ESCP). The ESCP is a living document and can be revised during implementation, if needed. To prevent possible social risks, the design of the project envisages the integration of citizens and stakeholder engagement. In the Stakeholder Engagement Plan (SEP), a comprehensive engagement strategy inclusive of a dedicated civic platform has been adopted with a specific target to reach the underserved part of the population.

The MoME intends to engage a consultant (individual local expert) to provide services as Social Specialist and serve as the main PIU focal person responsible for ensuring that social aspect of the project implementation is in line World Bank’s Environmental and Social Framework standards, principles and policies (hereunder the Consultant or the Social Specialist).

A part of the proceeds of the IBRD loan will be used for financing the proposed consultancy assignment. These Terms of Reference define the scope of activities and responsibilities of the Consultant. Additional PIU staff will be recruited under separate TORs for key positions and will include among others the Head of the PIU, an engineer, a financial/economic expert, and an IT expert.

## Objective of the assignment

Social performance of energy projects is critical for project success as well as social sustainability.

The Social Specialist will guide and support the PIU/MoME and LSGUs in project related social risk management. The Social Specialist will work closely with the PIU Director, the Environmental Specialist and other PIU specialists ensure the project social performance is in line with WB environmental and social policy and pertinent E&S framework.

## Scope of Work

The Social Specialist will ensure ESF implementation, which will include, but not be limited to, the following:

• Conduct a social review and screening process for the project activities (subproject proposals) to assess social impacts and vulnerabilities, and to determine a social risk category/level. As per ESMF all activities and subprojects to be financed under the Project must undergo an environmental and social screening in the manner described in the ESMF. The purpose of the social screening is to identify social risks and potential impacts of the proposed subprojects, determine the type of impact assessment to be carried out, and define measures aimed to prevent or minimize negative impacts. This is required to ensure compliance with the World Bank standards and that no subproject with substantial or high risks (impacts) type will be supported.

• Report on risks in a clear, concise, and well-reasoned manner and suggest and implement appropriate measures and action plans to adequately manage the risks through appropriate instruments.

• Develop specifications and assess requirements for contractors as needed to ensure project-specific social requirements are adequately addressed by the contracts.

• Determine the category of projects – depending on subproject type, location, sensitivity and scope, nature and intensity of environmental and social risks and impacts;

• Control and support of local self-governments and contractors during the preparation of ESMPs and ESMP Checklists, which is subject to World Bank approval;

• Carry out timely, meaningful consultations of ESMPs and other plans if needed, compliant to the ESMF;

• Any activities corresponding to the Bank Category 2 (“Moderate Risk”) Projects will be required to have an Environmental and Social Management Plan (ESMP) or ESMP Checklists in place prior to approval that would identify potential environmental impacts and provide adequate mitigation measures;

• Supervise the implementation of E&S instruments (LMP, SEP, ESMP and ESMP Checklist) and revise social risk and impacts assessments and reports upon request from World Bank.

• Perform internal inspections/audits of sub-project operations and contractors’ activities to ensure compliance with applicable requirements, including ESMF procedures, applicable social laws and regulations of the Republic of Serbia and standards.

• In the case of non-compliance determining and suggesting remedial actions; preparing non-compliance reports and keeping track of respective responses/actions undertaken.

• Participating in supervision missions and Regular reporting on the Project social performance to the World Bank

• Ensure the Grievance Mechanism for the Project (including workers grievance) is in place, Local Grievance Administration Desks (LGADs) are established and all information about how to submit complaints are available to project-affected people.

• Make sure that all relevant stakeholder groups (including vulnerable groups) are adequately informed and actively involved in consultation process regarding project activities.

• Together with Citizen Engagement (CE) and CE Platform manager, ensure that the feedback from stakeholders and citizens is received and replied to (prepare a report, which will include a list of all citizens´ comments/ inputs received and how they were addressed and incorporated in each project activities).

• Assist the MoME, the local self-governments and contractors in information dissemination and conducting public consultations of draft ESMP/ESMP Checklist, preparation of minutes of the meetings and finalization of the documents;

• Other actions to enable the Project to meet the social requirements within the legal framework of the Republic of Serbia and follow the Bank’s environmental and social policies and procedures.

## Reporting

The Consultant will report to the Head of the PIU under the MoME and will coordinate closely with the CFU under the MoF if necessary.

The Consultant should provide/submit monthly Time Sheets to Head of the PIU under the MoME, summarizing key issues and emerging and day-to-day tasks undertaken, as well as working days/hours spent on each issue and task, within 10 (ten) days after the end of the month for which the report is due.

The Consultant shall proactively prepare ad-hoc reports on any significant environmental and social issues arising during Projects implementation, at the MoME or Bank's request.

The Consultant will provide hard and/or electronic copies of any documents and technical materials developed during the Project in their original electronic format. The reports will be provided in English/Serbian language.

Assignment duration

The Consultant shall provide part-time service up to 10 days per month for the life of the Project, i.e. until November 30, 2027, with a probationary period of six (6) months. The Consultant shall deliver all the needed support at the daily rate that will be dependent on the qualifications, as well as approved project budget.

The Consultant shall not be engaged more than 48 hours per week cumulatively for this assignment plus any other additional assignments/contracts.

The Consultant shall not be involved in another assignment that represents a conflict of interest to the prevailing assignment.

Qualification Requirements

The Consultant shall possess the following qualifications**:**

**Education:**

* Advanced university degree (preferably Master’s degree) in Social sciences, Anthropology, Communication, Management studies, or other relevant disciplines.

**Experiences** :

* + - Minimum of 5 years of experience in assessing and managing project-related social risks,executing stakeholders/ citizen engagement, outreach activities and work with vulnerable groups (preferably for infrastructure development projects).
		- Experience in conducting social impact assessment, monitoring and evaluation of social projects and/orpreparation and implementation of ESIA/ESMPs for projects similar to the activities being financed.
		- A proven track record in delivering technical assistance related to assessment and management of social impact will be considered an advantage.

**Knowledge and skills:**

* Knowledge of and relevant experience with projects of international financial institutions will be considered an advantage.
* Preferable experience in working with NGO sector on housing programa
* Strong analytical skills and ability to identify key strategic issues, opportunities and risks.
* Demonstrated clear and concise writing/ reporting and presentation skills.
* Excellent interpersonal, networking and team-building skills.
* Excellent knowledge of written and spoken Serbian and English.
* Knowledge of computer, office software and web-based applications use.

**Competencies of successful candidate**

* Openness to change and ability to receive/integrate feedback
* Advanced communication skills and adaptability.
* Proactive and result oriented
* Time management and attention to detail.
* No obstacles for traveling within Serbia for various field trips.

Expected Outputs

E&S related inputs (social aspects) for the quarterly project management reports, twice-annual progress reports, annual budgets and work plans, and mid-term review documentation. Day-to-day management of the social aspects of the Project, and preparation of ad hoc reports and papers as the needs of the Project require.

Input by the MoME

The MoME will provide the Consultant with complete office infrastructure, the required equipment, access to any documentation and information necessary for the performance of his / her tasks.

Also, where the Consultant is required to travel, to the site or elsewhere in accordance with the MoME instruction, all transportation costs will be covered from the project budget.

Selection of consultant

A Consultant will be selected in accordance with the *Open Competitive Selection of Individual Consultants* as set out in the Bank’s Procurement Regulations.

The candidates will be evaluated applying the following evaluation criteria:

* General experience ( 40 Points)
* Specific Experience and skills relevant to the Assignment ( 60 Points)
1. https://www.mre.gov.rs/aktuelnosti/oglasna-tabla/javne-konsultacije-za-surce-projekat-public-consultations-surce-project [↑](#footnote-ref-2)