**TERMS OF REFERENCE**

**COMMUNICATIONS AND PUBLIC AFFAIRS**

***Serbia Scaling Up Residential Clean Energy (SURCE) Project***

1. **BACKGROUND**

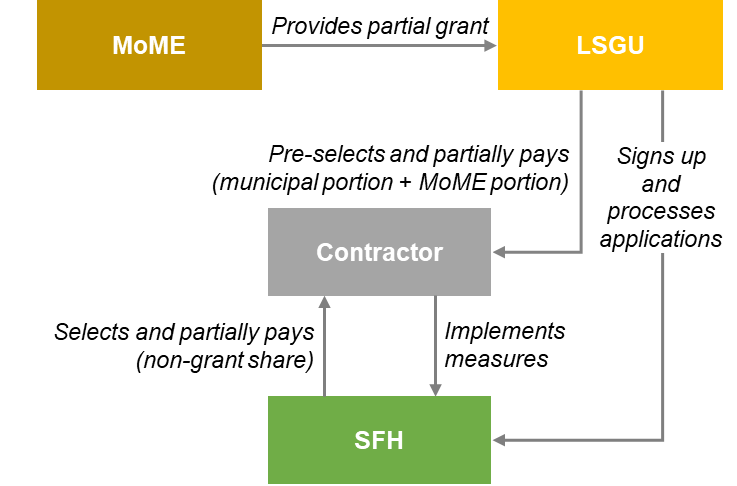
The Government of the Republic of Serbia (GoS) has secured financing from the International Bank for Reconstruction and Development (IBRD), which is part of the World Bank Group, to implement the Serbia ‘Scaling Up Residential Clean Energy’ (SURCE) Project, hereinafter “The Project”. The development 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.

**2. SCOPE OF THE ASSIGNMENT**

**2.1. Objectives**

The objective of the task is to engage a firm or joint venture (JV) with a proven track record in designing and implementing public affairs and communication strategies (hereinafter the “Consultant”) to support the communication and outreach activities related to the SURCE project that will pursue the following objectives:

1. Increase awareness of the costs and benefits of energy efficiency, sustainable heating, rooftop solar PV and other clean energy technologies in the residential sector among the potential project beneficiaries.
2. Promote the SURCE project and spread knowledge about the public calls to be launched under the project and about the modalities of the planned support mechanisms, especially for lower-income households;
3. Improve communication between SURCE stakeholders to increase program efficiency (including communication of MoME with LSGUs and contractors; and a two-way communication with potential beneficiaries via feedback mechanisms).

**3. DESCRIPTION OF SERVICES**

***3.1. Task 1. Manage the communication and outreach aspects of SURCE Project***

**In consultation with the MoME and World Bank, the Consultant is expected to design and implement communication and outreach activities for the public calls and other project activities conducted under SURCE**, which includes but is not limited to the following:

1. Develop an **Implementation Plan**, with multi-year communication and outreach activities, which will be implemented throughout the SURCE project (anticipated 4 years), in coordination with the Civic Engagement Platform developed under Task 2. The assignment will have in-built flexibility to integrate lessons learned during the first public calls under the SURCE project, utilize material generated in earlier phases of the program, and continuously improve the Plan in terms of targeting and mobilizing program participants based on a measurement & evaluation system assessing the campaign impact. Among other things, the development should include activities related to:

* Open and manage official accounts on social networks Facebook, Instagram, and LinkedIn for the SURCE Project (Timeframe: no longer than 10 days after delivery of the Implementation Plan);
* Create and publish promotional content for the Project's digital platforms (Facebook, Instagram, and LinkedIn) – graphic visuals (at least 10 monthly);
* Create and publish promotional video content (Reels) for the Project's Instagram account (at least 5 monthly);
* Create and publish promotional video content (Stories) for the Project's Instagram account (at least 12 monthly);
* Produce three short videos (maximum 3 minutes) for Projects' social media). Content – project implementation and activities, promotional videos (Timeframe: yearly in 2025, 2026, and 2027);
* Determining communication objectives by target group;
* Deciding on optimal frequency/timing of various activities;
* Defining clear and measurable goals to track the campaign’s effectiveness;
* Designing feedback/monitoring mechanisms and evaluation tools;
* Prepare an outreach campaign to raise awareness in beneficiary communities through social media channels I.e. Google Ads, Facebook marketing campaigns etc. To be directly linked to the CE platform (monthly targets: Engagement: more than 10.000, Views: more than 30.000, Impressions: more than 50.000, quarterly target: growth of at least 5%);
* Contribute to better visibility and promotion of the Project, including during the PiU team's visits to local self-governments by organizing visits, creating visuals, press releases, and video materials. (20 visits yearly in 2025, 2026, and 2027)
* Graphic design of promotional materials for each year different (leaflets, planner notebooks, pencils, paper bags – all with project logo, business card, project guidelines – handbooks etc.). Graphic design of the developed project handbooks. Handbooks with clear guidelines are aimed at the target group to facilitate understanding of a particular topic in the process of the project implementation. Handbook are up to 10 pages long. Graphic design should include charts, illustration, and other necessary graphic contents. (Timeframe: before Public calls in 2025, 2026, 2027)
* Provide guidelines and recommendations for improving LSGUs’ public calls for the selection of contractors and for the selection of final beneficiaries of the local programs. Organize one online event with LSGUs to share the proposed recommendations and collect feedback. For this event, the Consultant is expected to prepare, in close consultation with the PIU and the Ministry, the invitation, list of invitees, format of the roundtable/conference and logistics, information and promotion material, talking points for the MoME’s representative and other aspects needed for the roundtable/conference. (Timeframe: Public calls in 2025, 2026, 2027)
* Conducting stakeholders mapping and identifying audiences (internal and external) and the target groups for outreach (e.g., based on geographical location, income, living conditions). The key stakeholders include potential final beneficiaries (single-family house owners and household members), existing beneficiaries (participants in the pilot public calls), LSGUs, service providers / vendors / retailers, and banks. Other relevant stakeholders include but not limited to: media (national and local); other possible beneficiaries (owners of apartments in multi-apartment buildings ; utilities; state institutions with ecological or social missions; NGOs and influencers; business associations; schools; universities, researchers, thank tanks and opinion leaders, etc.
* Organize and conduct public opinion and stakeholders’ surveys related to indicators of the Project Development Objectives (PDO), upon request from MoME/PIU following defining the relevant level of statistical inference. Surveys should include end and direct users (citizens) who received subsidies, as well as citizens who did not participate to assess their opinion on the project's visibility and knowledge of energy efficiency measures, at least 500 respondents (Timeframe: yearly in 2025, 2026, and 2027).
* Develop and implement activities to raise awareness about the ESHS (Environmental, Social, Health, and Safety) components of the SURCE project in the “Safety through generations" subproject. This includes organizing annual competitions, in cooperation with PIU, in 5 schools in Serbia. Competitions will focus on topics such as environmental protection, social issues, and occupational health and safety, with categories in painting, graphic design, and IT activities. The Consultant will oversee the entire process, including the creation of guidelines based on the outcomes of these school workshops. The Consultant will ensure that children, students, and workers are actively engaged and educated on these critical topics. The task of the consultant will be to communicate with local self-government units and local media, and promote the task through the following activities: :
  + Creation of a special visual identity to raise awareness of the ESHS components of the SURCE project,
  + Creation and publication of at least 5 promotional video content (Reels) yearly for the Instagram social network;
  + Creation and publication of at least 10 graphic visual materials yearly for digital platforms Facebook, Instagram and LinkedIn;
  + Creation and publication of at least 20 promotional video content (Stories) yearly for Instagram;
  + Propose and organize a prize pool for competition winners;
  + Create a graphic publication of safety messages as a set of occupational safety recommendations that can be send to contractors;
  + Writing at least 5 media releases and coordinating with local media about competitions

Key outputs Task 1: Delivered Implementation Plan which will include all sub-tasks from Task 1.

***3.2. Task 2. Assist in designing a Civic Engagement Platform for SURCE***

According to the World Bank corporate requirements, SURCE must include a Citizen Engagement (CE) component, which consists in active engagement and ownership of citizens and project stakeholders, and interactive two-way communication with beneficiaries. CE improves accountability and transparency, and as a result, the relationship between government and citizens; and feedback received enables design and implementation adjustments.

An online CE Platform[[1]](#footnote-1) is being established for the SURCE project that will serve the following purposes:

* Dissemination and promotion of project benefits on a large scale to support the recruitment of large numbers of households for the scale-up; and
* Direct and transparent communication between the MoME, beneficiaries, and LSGUs

The CE Platform design will be based on available and accessible software (Citizen’s Foundation), where each community will have its own digital space. The World Bank will provide free support for draft demo development and the setup phase and organize training sessions to the designated person(s) to learn how to manage content and create new pages on the platform. After the launch, the CE Platform will be managed by the SURCE PIU, and World Bank will provide technical support and problem solving capabilities during the first year of operation. Citizens’ Foundation (the software owner) will provide 24/7 technical support.

The Platform can be accessible to all through smart phone and computers; the content can be translated into any language. MoME will be able upload project documents and relevant information and tools to citizens, municipalities, etc. Citizens and stakeholders can access information, leave written comments and questions, photos, audio and videos, answer surveys, provide feedback. The Platform will allow the MoME to reply in real time and connect with project beneficiaries, and collect data with downloadable reports and get real time diagnostics with Google Analytics and in-built analytics tool. The CE Platform for SURCE could be organized around three proposed “windows”: 1) Information sharing window; 2) Stakeholder consultations window; and 3) Monitoring window. A phased approach is proposed, i.e. the windows and their content can be put in place step-by-step (based on priorities) in coordination with PIU. The proposed approach for SURCE is still being discussed and modifications and adjustments are possible.

**The Consultant is expected to contribute to the Platform set up phase to design CE architecture compatible with SURCE requirements:**

1. Participate in workshop(s) to be organized by MoME and World Bank to co-develop CE platform design and implementation plan.
2. Review examples of similar platforms from other countries and draw lessons applicable to Serbia.
3. Work with the WB CE team that will develop a platform structure and present it to MoME for feedback: provide expert opinion on the CE Platform design, content, and implementation arrangements, including phased roll out.

The development of the Platform is planned after signing the contract with the Consultant, in cooperation with SURCE PIU and the World Bank.

***Key outputs Task* 2**: Report summarizing recommendations for the CE Platform design, content, and implementation arrangements; active participation in meetings and discussions related to the CE.

**4. PERIOD OF PERFORMANCE AND DELIVERABLES**

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| --- | --- |
| **Deliverable** | **Timeline** |
| 1.Implementation plan with multi-year communication and outreach activities | Within 1 month of the start of the assignment |
| 2. Progress and Financial report (4thquarter 2024) | 15th January 2025 |
| 3. Progress and Financial report (1st quarter 2025) | 15th April 2025 |
| 4. Progress and Financial report (2nd quarter 2025) | 15th July 2025 |
| 5. Progress and Financial report (3rd quarter 2025) | 15th October 2025 |
| 6. Progress and Financial report (4th quarter 2025) | 15th January 2026 |
| 7. Progress and Financial report (1st quarter 2026) | 15th April 2026 |
| 8. Progress and Financial report (2nd quarter 2026) | 15th July 2026 |
| 9. Progress and Financial report (3rd quarter 2026) | 15th October 2026 |
| 10. Progress and Financial report (4th quarter 2026) | 15th January 2027 |
| 11. Progress and Financial report (1st quarter 2027) | 15th April 2027 |
| 12. Progress and Financial report (2nd quarter 2027) | 15th July 2027 |
| 13. Progress and Financial report (3rd quarter 2027) | 15th October 2027 |
| 14. Final implementation and completion report | By the end of the assignment |

**Acceptance of the deliverables:**

All deliverables shall be prepared in both English and Serbian for revision and comments by PIU/MoME and by the World Bank team and deemed to be final upon approval by the Client. Deliverables will be accepted if the following requirements are met:

• The content of each deliverable shall correspond to the Implementation plan and descriptions in sections 2 and 3 of this ToR;

• The Deliverables shall be submitted in time, unless a different timing has been agreed with the Client and recorded in writing (email);

• The Deliverables shall be written in clear and concise language, be technically correct, and free of grammatical and typographical errors;

• All deliverables shall be submitted in electronic versions by e-mail, unless otherwise specified. The communication materials to be printed (flyers, brochures, etc.) shall be submitted in the form and at the medium ready for reproduction.

**4. REPORTING and ACCESS TO DOCUMENTS**

The Consultant will refer to the MoME (the “Client”) for all issues that could appear in the execution of the assignment, and for decisions to be taken in reference to the present assignment.

The Consultant shall submit to PIU/MoME and the World Bank quarterly progress and financial reports comprising the list of activities and related costs incurred during the reported period for the activities approved by the Client and implemented by Consultant, based on the agreed Implementation Plan developed as part of Task 1, consisting of activities/outputs, timelines of implementation and related costs and specifying the sum of quarterly activities, covering the entire timeframe of the contract.

The Consultant will closely cooperate and coordinate with and report to the PIU acting on behalf of the Ministry of Mining and Energy, and shall prepare documentation according to agreed reporting format, including regular Progress Reports and financial reports, as well as reports on the results of the public opinion and stakeholders’ surveys regarding PDO indicators. These reports will provide general information on the Project progress in regard to communication and the media coverage on the Project and energy efficiency/clean energy/sustainable heating. These reports will also evaluate the effectiveness of the Project’s communication activities and include recommendations and conclusions on how to strengthen and/or revise the Implementation Plan. The reports are expected to be submitted quarterly. A final implementation and completion report shall be submitted at the end of the assignment (which will be part of the assignment deliverables).

The MoME and World Bank will share available documentation at the outset of the assignment and will make staff available to discuss with the Consultant and enable quality outputs. The available information includes:

* Relevant documents related to the SURCE project including Project Appraisal Document (PAD), Stakeholder Engagement Plan (SEP), and Findings from Walk-trough Energy Audits and Contribution to PAD (November 2021).
* Materials from previous energy efficiency and clean energy communication campaigns carried out by the MoME,[[2]](#footnote-2) notably under the activities funded by IPA 14 and 16.
* The Energy Efficiency Awareness Strategy of July 2021, draft version prepared by HULLA & Co Human Dynamics GmbH & Co KG for the Ministry of Mining and Energy of the Republic of Serbia with the financial assistance of the European Union.
* The results of the qualitative survey (focus group discussions) of low-income and vulnerable households that are the beneficiaries of financial social assistance (SA) and the households that are eligible for the energy vulnerable program (EVP) support;
* The results of in-depth interviews with actors involved in the current public call for co-financing of energy efficiency measures (2021) – Ministry of Mining and Energy (MOME), Local Self Government Units (LSGU), and private companies.

**5. QUALIFICATIONS REQUIREMENTS**

The Consultant is expected to have expertise and experience in designing and implementing comprehensive strategic communication interventions in the areas of energy efficiency and clean energy. The Consultant will be required to have the following minimum qualifications:

* The Consultant shall be registered as a legal entity;
* Minimum of five (5) years of experience in the field of communication, marketing and public relations.
* A proven record of successful accomplishment of similar assignments (minimum two in the last five years);
* Previous working experience in the development of a communication plan and strategies – at least one strategy in the last three (3) years;
* Experience working with media representatives in international donor-funded projects, public administration, and project implementation work is desirable.
* **Previous experience managing communications within specific areas relevant to the Project (sustainable development, ecology, energy efficiency) is highly desirable.**

As a proof for similar assignements, the Consultant shall prepare a table listing following information: name of the relevant assignment, name of a firm that conducted the assignment, short scope of work, year of contract implementation, country/region, contact reference (name, e-mail, phone number).

The Consultant can be a joint venture (JV) between maximum two legal entities.

A letter of intent or a copy of an existing JV agreement shall be submitted as a part of the documentation, together with a power of attorney for the authorized representative of each JV member, or a power of attorney for the representative of the lead member to represent all JV members.

The Consultant must provide a team of experts covering the following requirements:

Key expert 1 – Team leader

* Must have a minimum of 5 years of professional experience in any of the following development communications, public relations campaigns, marketing communications, communication strategies and Action plans development and implementation,
* Capability and proven experience in drafting and implementing communications strategies,
* Capability and proven experience in crafting messages and products in various formats (press releases, success stories, reports, audio, video etc.) targeting a variety of audiences,
* Must have a minimum of bachelor’s degree in the field of public relations, journalism, communications, marketing, or related fields.

Key expert 2 - Specialists Personnel - PR advisor

* Should have at least 3 years of experience in delivery the same or the similar services in the in the field of public relations and cooperation with the media,
* Capability and proven experience in implementing communications strategies and activities arising from the strategy,
* Must have at least a bachelor’s degree in public relations, journalism, communications, marketing, or related fields.

Key expert 3 - Specialists Personnel – Graphic Designer

* Should have at least at least 3 years of experience in delivery the same or the similar services in the in the field of graphic design, preparation for printing, preparation of materials for social media,
* Capability and proven experience in implementing communications strategies and activities arising from the strategy in the field of graphic design,
* Must have a minimum of bachelor’s degree in the field related to the assignment

Key Experts' CV are not required and will not be evaluated at this stage.

**6. SELECTION**

The Consultant will be selected in accordance with CQS method set out in the World Bank’s Procurement Regulations for IPF Borrowers (July 2016, revised November 2017 and August 2018).

Expressions of interest will be evaluated based on the following criteria:

|  |  |
| --- | --- |
| General experience | 40 points |
| Consultant’s specific experience related to the assignment | 60 points |
| **TOTAL:** | **100 POINTS** |

1. An example of a CE Platform for CASA1000 Community Support Project in the Kyrgyz Republic <https://casa-1000-csp.yrpri.org/community/1402> [↑](#footnote-ref-1)
2. The Ministry of Environmental Protection in 2021 has initiated a program on boiler replacement which might have been communicated about separately. [↑](#footnote-ref-2)