

SERVICE CONTRACT NOTICE

Local Associate for Facilitators of Enrolment/Mapping and Business Facilitation for the purposes of Project Implementation - EU Support to REDI Phase II: Advancing Roma Entrepreneurs in the Western Balkans and Türkiye, Location: Montenegro

1. Reference

IPA III/2024/457-197/SRB-013

2. Procedure

Simplified

3. Programme Title

EU Support to REDI Phase II: Advancing Roma Entrepreneurs in the Western Balkans and Türkiye

4. Financing

Budget Line: 5.2.4

5. Contracting Authority

Roma Entrepreneurship Development Initiative Serbia REDI Serbia

CONTRACT SPECIFICATION

6. Nature of Contract

Global Price

7. Contract Description

The Contracting Authority engages the Contractor (Local Associate) to support the implementation of the project “EU Support to REDI Phase II: Advancing Roma Entrepreneurs in the Western Balkans and Türkiye” in Montenegro during the 2026–2027 period. REDI aims to strengthen local operational presence through outreach, beneficiary enrolment, coordination with key stakeholders, and facilitation of financial and non-financial services for Roma and Egyptian entrepreneurs and jobseekers. The Local Associate will support service delivery, community engagement, monitoring and reporting, and partnership-building with local institutions, NGOs, and microfinance partners. Through these activities, the Contract contributes to advancing economic inclusion, entrepreneurship, and employment opportunities for Roma and Egyptian communities in Montenegro.

8. Number and Titles of Lots

This Tender is not divided into LOTS.

9. Maximum Budget

11.040,00 EUR

CONDITIONS OF PARTICIPATION

10. Legal basis, eligibility and rules of origin

[For IPA III 2021/1529¹]:

The legal basis of this procedure is <Regulation (EU) No [1529] establishing the Instrument for Pre-accession Assistance (IPA III)>. See Annex A2 of the practical guide.

For this contract award procedure, participation is open to all legal persons (participating either individually or in a grouping – consortium – of candidates/tenderers) which are effectively established in a Member State of the European Union or in an eligible country or territory as defined under Article 11 of Regulation (EU) No [1529] establishing the Instrument for Pre-accession Assistance (IPA III).]

Participation in this procurement procedure is open on equal terms to all legal persons falling within the scope of the Treaties.

11. Number of tenders

No more than one tender can be submitted by a 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 legal person submits more than one tender, all tenders in which that person has participated will be excluded.

No restrictions may be made in the number of lots a tenderer can be awarded.

The tenderer may submit a tender for one lot only, several lots or all of the lots, but only one tender per lot. Contracts will be awarded lot by lot and each lot will form a separate contract.

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 2.6.10.1. of the practical guide.

Tenderer included in the lists of EU restrictive measures (see Section 2.4. of the PRAG) at the moment of the award decision cannot be awarded the contract.

13. Sub-contracting

Subcontracting is allowed.

PROVISIONAL TIMETABLE

14. Provisional commencement date of the contract

20/02/2026

15. Implementation period of the tasks

Within 12 months, in the period between Feb 2026 – Jan 2027, upon the request of the Contracting Authority

¹ Regulation (EU) 2021/1529 of the European Parliament and of the Council of 15 September 2021 establishing the Instrument for Pre-Accession assistance (IPA III); OJ L 330, 20.9.2021, p. 1–26.

SELECTION AND AWARD CRITERIA

16. Selection criteria

Capacity-providing entities

An economic operator (i.e. candidate or tenderer) may, where appropriate and for a particular contract, rely on the capacities of other entities, regardless of the legal nature of the links it has with them. If the economic operator relies on other entities, it must in that case prove to the Contracting Authority that it will have at its disposal the resources necessary for the performance of the contract by producing a commitment by 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 and notably that of nationality as the economic operator relying on them and must comply with the selection criteria for which the economic operator relies on them. **Furthermore, the data for this third entity for the relevant selection criterion should be included in a separate document.** Proof of the capacity will also have to be provided when requested by the Contracting Authority.

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 tasks for which these capacities are required.

With regard to economic and financial criteria, the entities upon whose capacity the economic operator relies, become jointly and severally liable for the performance of the contract.

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.

The tenderer shall not use previous experience which caused breach of contract and termination by a contracting authority as a reference for selection criteria.

The selection criteria for each tenderer are as follows:

1) Economic and Financial Capacity of the Tenderer (Based on Item 3 of the Tender Form). In case of tenderer being a public body, equivalent information should be provided. The reference period which will be taken into account will be the last three financial years for which accounts have been closed.

The objective of this criterion is to examine whether or not the tenderer (i.e. the consortium as a whole, in the case of a tender from a consortium) will not be economically dependent on the contracting authority in the event that the contract is awarded to it;

2) Professional Capacity of the Tenderer (Based on Item 4 of the Tender Form).

The reference period which will be taken into account will be the last three years preceding the submission deadline.

- Enrolment/Mapping/Outreach and/or Business Facilitation Expertise: Proven track record of successfully managing similar services
- Communication Skills: Excellent communication, coordination, and problem-solving skills
- All assigned personnel are expected to be fluent in English (written and spoken); knowledge of

additional regional languages is an asset

- The Contractor shall provide a dedicated person, with a minimum of 3 years of experience in Enrolment/Mapping/Outreach and/or Business Facilitation, including but not strictly limited to areas:

1. **Business Facilitation:**
Responsible for overall planning, coordination, and supervision of outreach, enrollment, and business facilitation activities, ensuring alignment with REDI's objectives, timelines, and reporting requirements.
2. **Outreach and Enrolment:**
Responsible for field outreach, community engagement, mapping of potential beneficiaries, data entry into REDI systems, and support throughout the enrolment process for business development, employment, and access to finance services.
3. **Coordination and Communication:**
Responsible for coordination with REDI staff, local stakeholders, microfinance institutions, NGOs, and public institutions, as well as for maintaining clear and timely communication related to service delivery and beneficiary follow-up.

Professional Conduct

All assigned personnel shall demonstrate strong organizational, communication, facilitation, and problem-solving skills, and shall maintain a high standard of professionalism, confidentiality, and beneficiary-centered service at all times.

Availability

All assigned personnel must be available throughout the duration of the assignment and actively participate in planning, implementation, coordination meetings, and reporting activities as requested and previously agreed with REDI.

Preferably, but not mandatory

Education: A relevant academic background in economics, business administration, social sciences, development studies, finance, or a related field shall be considered an asset.

All assigned personnel must be independent and free from conflicts of interest in the responsibilities they take on.

- 3) Technical Capacity of Tenderer** (Based on Items 5 and 6 of the Tender Form). The reference period which will be taken into account, will be the last two years preceding the submission deadline.

17. Award criteria

Best Price-Quality Ratio.

TENDERING

18. Deadline for submission of tenders

The deadline for submission 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 simplified procedures, the format and instructions of which must be strictly observed. The tender form is available from the following internet address:
[https://wikis.ec.europa.eu/display/ExactExternalWiki/Annexes#Annexes-AnnexesB\(Ch.3\):Servicecontracts](https://wikis.ec.europa.eu/display/ExactExternalWiki/Annexes#Annexes-AnnexesB(Ch.3):Servicecontracts), under the zip file called Simplified Tender dossier.

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

[https://wikis.ec.europa.eu/display/ExactExternalWiki/Annexes#Annexes-AnnexesA\(Ch.2\):General](https://wikis.ec.europa.eu/display/ExactExternalWiki/Annexes#Annexes-AnnexesA(Ch.2):General)

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, the tenderers accept to receive notification of the outcome of the procedure by electronic means.

21. Alteration or withdrawal of tenders

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 9 of the instructions to tenderers.

22. Operational language

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

23. Additional information

Financial data to be provided by the candidate in the standard application form must be expressed in EUR. If applicable, where a candidate refers to amounts originally expressed in a different currency, the conversion to EUR shall be made in accordance with the InforEuro exchange rate of month and year of the applicable InforEuro exchange rate, which can either correspond to the month and year of the publication of the present contract notice or the month and year corresponding to the deadline for submitting applications, which can be found at the following address:
<http://ec.europa.eu/budget/graphs/inforeuro.html>.