REQUEST FOR QUOTATION FOR SERVICES

ENERGY SAVINGS INSURANCE EUROPE 2.0 PROJECT (ESI Europe 2.0)

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**potentials and obstacles of the implementation of the model of an energy efficiency upgrade with the use of GoSafe with ESI (ESI model).**

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| 1. **SUMMARY**   Društvo za oblikovanje održivog razvoja (DOOR) and The Basel Agency for Sustainable Energy (BASE) are seeking for a service of mapping and analysing the potentials and obstacles of the implementation of the energy efficiency upgrade model using GoSafe with ESI (ESI model).The project is funded by the H2020 program and aims to stimulate investments in Energy Efficiency (EE) through a contracting model that involves the implementation of an Energy Savings Insurance.  Quotes for these services should be submitted electronically by23:59 pm CET, 25 March 2024. The quote submission details are outlined in section E below. |
| 1. **PROJECT BACKGROUND AND OBJECTIVES**   In September 2021 BASE (Switzerland), DOOR (Croatia), CRES (Greece) and SIEA (Slovakia) launched the ESI Europe 2.0, a three-year project aimed at promoting the ESI model (GoSafe with ESI solution) in Croatia, Greece and Slovakia. The project would continue with the efforts made in Italy, Portugal, and Spain to roll out the ESI model (ESI Europe project). The ESI Europe 2.0 project has received funding from the European Union’s Horizon 2020 research and innovation programme.  The ESI model aims to scale up investments in energy efficiency, facilitate the flow of financing for energy efficient technology solutions and address the large untapped market potential. The ESI model targets small and medium-sized enterprises (SMEs) as clients, and creates the conditions for them to upgrade specific old inefficient technologies to new EE technologies. The ESI model project is expected to mobilise around EUR 30 million in investments in EE projects in the three countries within the coming 2 years.  The ESI model has been successfully implemented in Colombia and Mexico, and is currently being developed or planned in six other countries in Latin America, Africa and Asia. The ESI model is currently operational in Spain, Italy and Portugal, under the brand GoSafe with ESI. The ESI model was recognised by the Global Innovation Lab for Climate Finance as one of the most promising instruments to mobilise private sector investments in energy efficiency. It is also featured in the G20 Energy Efficiency Investment Toolkit from UNEP-FI and the Compendium of Financing Instruments for the Low-Carbon Economy from the Swiss Sustainable Finance.  The ESI model comprises financial and non-financial elements designed to work together to create trust and credibility among key actors, and to reduce the risk for SMEs to invest in energy efficiency. The model consists of five main components:  **Standardised contract:** Standardised, simplified contracts offer a clear and transparent framework for negotiations between key actors (SMEs and technology providers) on how the project’s energy savings are guaranteed. This reduces the risks involved in energy efficiency projects, distributes the remaining risk to appropriate actors, and fosters trust among them.  **Energy savings insurance:** The model includes a risk coverage product provided by a third party to insure against the provider failing to fulfil their contractual obligations regarding the energy savings. The insurance creates trust between the SME and the technology provider, and also reduces the credit risk of the SME.  **Validation:** An independent technical validation process is integrated into the project, to overcome the perceived high risk of performance of energy efficiency projects. An independent validation entity (VE):   * evaluates the capacity of the project to deliver the promised energy savings * validates the installation of projects * validates the first year of energy savings reporting prepared by the provider * acts as an arbitrator if required.   The technologies covered with respective validation handbook methodologies include: HVAC, compressed air, boilers, electric motors, lighting, refrigeration, co-generation, photovoltaics, solar water heaters and whole facility (combination of technologies).  **Financing:** Competitive credit conditions, suitable tenors and support to access collateral can help SMEs in financing these technology solutions. The project identifies and links existing financial instruments to enable EE projects, using GoSafe with ESI. The FIs benefit from the model by reducing the credit risk of their borrower, and mobilising green finance.  **Management Information System:** To facilitate the exchange of information and documents between stakeholders, an online platform has been developed during the ESI Europe project, using blockchain technology. It is a web-based portal, accessible via a secure password, which records each step of the process, providing perfect transparency on every operation while guaranteeing users’ privacy and control over data.  For more information on the project, please visit:  <https://www.esi-europe.org/>  <https://energy-base.org/projects/esi-europe-2-0/>  Attached to the TOR there is a presentation of the ESI model that gives an overview of the processes and the role of stakeholders.  BASE is a Swiss not for profit foundation and a specialized partner of United Nations Environment Programme. BASE is located in Basel, Switzerland.  DOOR (Society for Sustainable Development Design) is a civil society organization founded in 2003. DOOR’s mission is the promotion of sustainable development principles in all segments of society, at the local, regional and national levels, primarily in the field of energy. DOOR’s aim is to contribute to achieving a just and carbon-neutral society, adapted to unavoidable climate change, in which the public takes part in delivering, monitoring, and evaluating public policies, and sustainable energy plays an important role in social, economic, and ecological development and decreasing poverty DOOR operates within the three strategic areas: energy efficiency, renewable energy and climate change. In general, DOOR aims to contribute to achieving a low-carbon society, adapted to unavoidable climate change without energy poverty. DOOR has successfully implemented more than 100 projects with goals ranging from climate change mitigation, encouraging citizens’ participation in sustainable energy policy-making, improving education about renewable energy sources,, and alleviating energy poverty. Within the projects more than a hundred workshops, round tables, training, conferences, and other public events were organized, attended by several thousand participants, a dozen manuals were published, a number of study trips were organized and continuous cooperation with numerous organizations from Croatia and abroad was established. 14 employees, 60 members, and depending on current activities and requirements at times over 20 active volunteers. DOOR’s office is fully equipped with an internet connection, phone, and all necessary services needed for successful operation. |
| 1. **SCOPE OF WORK**   The scope of work is to map and analyse the potentials and obstacles of the implementation of the model of an energy efficiency upgrade with the use of GoSafe with ESI (ESI model).  The ESI model as described in section B, is ready to be piloted in Croatia under the brand name of GoSafe with ESI, where all the model elements and documentation are adapted to the local regulation and languages and the relevant other stakeholders (Validation Entity, Insurance company, local legal firm), are already engaged and ready to support the pilot projects.  Currently, the project consortium is working through the planning and execution of different activities to engage TPs and SMEs in adopting GoSafe with ESI for their energy-efficient project. The activities include:  Organising Capacity Building activities on GoSafe with ESI for TPs, SMEs  Connecting with relevant stakeholder associations to promote GoSafe with ESI  Participating in conferences, trade fairs, and events with relevant thematic topics and audience  Creating a value pack for TPs and listing benefits for SMEs, for their engagement with the ESI model  The consortium has also created the GoSafe with ESI website, to communicate directly with the targeted audience of potential client SMEs and TPs ([www.gosafe-esi.com](http://www.gosafe-esi.com) available in 7 languages).  The services required through these TOR will complement the list of activities above and the task is to map and analyse potential obstacles and new opportunities to create the pilot projects in Croatia and to write a comprehensive analysis showcasing the scope of the information on the GoSafe model, stakeholders opinions and views on the model as well as their willingness to engage with the model and possible opportunities.  The expert should target and analyze:   * + - 1. Large technology providers (TP) who could provide energy efficient technologies with GoSafe with ESI solution.       2. SMEs who could be ready to invest in Energy Efficient technologies and would potentially use the GoSafe with ESI solution for their investment.       3. Financial institutions that have the conditions to provide finance to businesses wishing to upgrade their energy use to more efficient solutions, through existing or new financing instruments.       4. Insurance companies that offer energy saving insurance or are willing to develop an applicable insurance product.   **Task 1. Project Management**   1. **Drafting a work plan:** Drafting a work plan for the contract duration where the strategy on how task 1 will be achieved is detailed, including a timeline of activities. It is expected that the consultant will have weekly calls with the consortium to inform and discuss the ongoing activities   -> Timeline: +2 weeks of contract signature  -> Deliverable D1.1: Work Plan   1. **Stakeholder Mapping:** Identifying and categorizing key stakeholders from the TP, SMEs, bank, and insurance companies that fit the description at the beginning of Section C. Creating a map (Excel sheet) with all relevant information and the level/nature of contacting these stakeholders. This map is to be continuously updated throughout the service duration and delivered in its final form with the final reporting. The information for the map could also be provided by the Contractor.   -> Timeline: +2 weeks of contract signature  -> Deliverable D1.2: Excel sheet of stakeholder mapping  **Payment method:** The payment of this subtask will be executed until mid-May, upon approval of Deliverables D 1.1 and D1.2 from DOOR.  **Task 2. Stakeholder Analysis**   1. **The methodology:**   Conduct a survey and semi-structured interviews with the stakeholders from the TP, SMEs, bank, and insurance companies to analyze their motivation, willingness, and potential as well as possible obstacles in engaging with the GoSafe with ESI solutions for their investment.  The expert should provide a draft of the survey and questions for the interview before conducting the survey and interviews. The questions need to be approved by the contractor.  -> Timeline: +3 weeks of contract signature  -> Deliverable D2.1: Questionnaire and questions for the interviews.  **Payment Method:** The payment of this subtask will be executed until mid-May, upon approval of Deliverable D 2.1. from DOOR.   1. **Analysis:**   Conduct the survey and semi-structured interviews:  The survey needs to cover at least 100 individual stakeholders from the TP, SMEs, banks, and insurance companies.  Semi-structured interviews need to cover at least 10 stakeholders from the TP, SMEs, banks, and insurance companies.  -> Timeline: Mid-July.  -> Deliverable D2.2: Transcripts of the interviews and raw data on the survey and descriptive analysis of the results including recommendations and conclusions  **Payment Method:** The payment of this subtask will be executed by the end of July, upon approval od Deliverables D 2.2. from DOOR.  The ESI 2.0 consortium team offers an initial set of documentation, stakeholder lists, and marketing material already developed to be used by the consultant. The team is also happy to share the experience of the previous stakeholder engagement activities and collaborate with the consultant and integrate into ongoing project activities, such as the participation in capacity building sessions.  The profile of the consultant we are looking for is:   * at least 7 years of experience in the field of conducting market analysis * Good ability to understand technical aspects in simple understandable terms (economic background is a plus) |
| **D. DELIVERABLES, TIMELINE, FEES and PAYMENT SCHEDULE**  The following table contains expected dates and timing for each activity and deliverable. It is expected that the selection of the service provider and signing of the contract will occur in April, 2024.   1. **Deliverables and Timing**   **Table 1: Deliverables and Timing**   |  |  |  | | --- | --- | --- | | **DELIVERABLE** | | **EXPECTED TIMING** | | Deliverable 1: Project Management | D1.1: Work Plan as described in Task 1 | +2 weeks after contract signature | | D1.2: Stakeholder Map (excel file) as described in Task 1 | +2 weeks after contract signature | | Deliverable 2: Stakeholder Analysis | D2.1: The description of the methodology and questionnaire and questions for the interviews. | +3 weeks after contract signature | | D.2.2. The analysis | Mid July 2024 |  1. **Payment Fee and Schedule**  |  |  |  |  | | --- | --- | --- | --- | | **Payments** | **Fixed Fee EUR** | **Fixed Fee %** | **Time** | | Payment 1 | 2 100 EUR | 30% | End of the first month after contract signature | | Payment 2 | 2 100 EUR | 30% | End of the July 2024 | | Payment 3 | 2 800 EUR | 40% | Mid-August 2024 | | **Total Fixed Fee** | 7 000 EUR including VAT |  |  | |
| **E. SUBMISSION OF QUOTATION AND EVALUATION CRITERIA**  **Quotation submission process:**   * Quotations should be submitted in English before March 25, 2024, 23:59 CET time. * The quotation should include a technical offer:   + - 1. The **technical offer** should clearly indicate and contain: * a description of the consultant/consultant team carrying out the activities, including the consultant's experience in providing similar services. * the proposed approach and rationale for all activities and deliverables outlines above   + - 1. Selection of preferred bidder: March 2024   **Please send quotes via email to:**  Sandra Silvar  [sandra.slivar@door.hr](mailto:sandra.slivar@door.hr)  **Deadline for submission:** March25, 2024, 23:59 CET time.  **Quotes will be evaluated and selected based on the principle of best value for money.**  This includes technical and quality aspects that reflect the suitability of the proposal: Suitability and clarity of the proposed approach, and demonstrated understanding of the objectives and scope. Suitability and quality of the work samples and consultancy experience. |
| **F. CONTACT DETAILS**  For questions please contact:  Sandra Silvar  [sandra.slivar@door.hr](mailto:sandra.slivar@door.hr) |