

TERMS OF REFERENCE

Design Services for Improvement of Infrastructure, Public Spaces and Cultural Monuments for Berat Castle.



Albanian-American
Development Foundation

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Invitation Letter

To whom this may concern:

The Albanian-American Foundation, in collaboration with the Ministry of Culture and the Municipality of Berat, both national and international companies to submit proposals for design services to **Improve Infrastructure, Public Spaces, and Cultural Attractions at Berat Castle.**

International architectural and design studios are encouraged to apply, provided they can comply with Albanian legislation, particularly regarding registration and licensing requirements. Collaborations with locally licensed professionals and/or studios are permitted to ensure compliance

All proposals will be processed as per the Albanian-American Development Foundation internal procurement procedures.

Albanian American Development Foundation

The mission of the foundation is to facilitate the development of a sustainable private sector economy and a democratic society in Albania and to contribute to stability in Southeastern Europe. The AADF will sponsor the following programs to further its mission: education for sustainable development, entrepreneurship; leadership development; and support for cultural tourism and eco-tourism. <https://aadf.org/>

Ministry of Economy, Culture and Innovation (MECI)

MECI is the Ministry responsible for Culture in the Republic of Albania, in accordance with the main directions of the general state policy and program of the Council of Ministers, exercises its activity in these areas: designs, programs, and develops national policy on culture, cultural heritage, material and non-material, the growth of religious tolerance, cultural dialogue, and cultural integration into the European and global world and in line with the government of the Republic of Albania. <https://meki.gov.al>

Municipality of Berat

The Municipality of Berat is the institution in charge of local government, including the castle., They are responsible for the realization of the city's functions, municipal administrative services, and powers as defined by the legal and by-laws in force in the Republic of Albania. The municipality of Berat is a union between the city and the four former municipalities in the vicinity, thus intertwining diverse social and cultural characteristics. The city of Berat, due to its thousand-year history as a residential area, carries rare historical and architectural values, and in 2008 it was included on the World Heritage List together with Gjirokastra. <http://bashkiaberat.gov.al/>

PROJECT BACKGROUND

As part of its portfolio, the AADF focuses on preserving the rich natural and cultural heritage of Albania and developing the economies of surrounding communities. Its objective is to implement sustainable projects that focus on local capacity building, increasing employment opportunities, and creating strategic management models for fragile natural or cultural heritage sites.

In this framework, The Albanian-American Development Foundation is collaborating with The MECI and the Municipality of Berat on a series of projects aimed at improving the quality of life in the World Heritage City of Berat while protecting and promoting the city's cultural heritage. These Terms of Reference are for the development of cultural attractions and infrastructure designs for the community within the Castle of Berat. This project will guide the installation of necessary infrastructure and enhance additional cultural attractions. This will lead to the promotion of sustainable tourism that respects the community while encouraging economic and social development.

These Terms of Reference are for the design and development of a series of projects aimed at upgrading infrastructure, and developing cultural attractions. A series of projects have been identified and included in the scope of this project that ranges from improving the infrastructure to the design of open spaces for venues and wayfinding. All projects are designed to simultaneously address the issues of the private community residents and businesses while also attracting and retaining visitors. This project will also conduct research, inform, and prepare recommendations for potential subsequent projects. All projects must be in alignment with the *National Strategy for Culture 2019-2025*, Albania's *National Strategy for Sustainable Tourism Development (2019-2023)*, and with international conservation and tourism standards, given the city's status as a World Heritage property.

Aligned with the objectives of the Integrated Management Plan for the UNESCO World Heritage property of Historic Centers of Berat and Gjirokastra, this project reinforces cultural heritage protection and community resilience through responsible and sustainable touristic infrastructure and management, in line with the newly updated ICOMOS International Cultural Heritage Tourism Charter.¹

1. LOCATION

1.1 Historical Overview and Significance

Berat is located in central Albania, 120 km south of the country's capital, Tirana. It is the administrative center of the Berat region and one of the two designated ancient museal

¹ <https://www.icomos.org/en/89-english-categories/home/118410-the-new-icomos-international-charter-for-cultural-heritage-tourism-supports-a-more-responsible-and-sustainable-tourism-management>

cities in Albania. Lying on both sides of the Osum River, Berat has been permanently inhabited for over 2500 years by Illyrian, Roman, Byzantine, Bulgarian, Ottoman, and Albanian civilizations. Berat is a rare collection of Ottoman architecture, and it bears witness to the coexistence of various religious and cultural communities throughout the centuries. Its urban center reflects the vernacular housing tradition of the Balkans, examples of which date mainly from the late 18th and 19th centuries. This tradition has been adapted to suit the town's lifestyles and geology with tiered houses on the slopes, which are predominantly horizontal in layout and maximize the use of abundant daylight. Berat bears outstanding testimony to the diversity of urban societies in the Balkans and to longstanding ways of life which today have almost vanished. Recognizing these values, integrity, and authenticity, in July 2008, the town was inscribed on the World Heritage List.

The Berat Castle, most of which was built in the 13th century, dates back 2,400 years. After many centuries of stone reinforcement, the exterior (perimeter) was enlarged slowly over time, during the Byzantine period, in the 5th, 6th, and 13th centuries and later during the Ottoman period. One key aspect is that the Castle continues to be inhabited to this day, with approximately 600-700 inhabitants.

1.2 Current situation

In its current state, the Castle is comprised of the Byzantine-Ottoman architecture of the surrounding wall with 24 towers and five entrances. It covers an area of 9.6 ha and contains 148 cultural monuments within the walls, 20 of which are categorized as first-category monuments. Most of the buildings inside are privately owned, with four buildings and six open spaces administered by the state. There are several Byzantine churches, mainly from the 13th century, as well as mosques built during the Ottoman era, which began in 1417. There are approximately 30 businesses within the Castle, mostly family-run and informal, consisting of guesthouses, restaurants, bars, and artisanal shops. The Castle is connected to the lower town through a cobblestone road and numerous pedestrian paths.

1.3 Tourism data

According to the UNDP 2022 report-Tourism and Hospitality in Albania - *An assessment of tourism trends and performance*,² the economic prosperity of Albania has been tied to the development of tourism, which is one of the country's most important sectors and has a significant multiplier effect on economic activity. In the last few years, the direct contribution of travel and tourism to Albania's GDP has been in the range of 8.5-8.7%. However, when multiplier effects from indirect sources are considered, the total contribution is almost three times higher, amounting to more than 20% of the GDP, making this sector one of the key growth drivers. In 2020, the sector took a significant hit from the devastating earthquake and the ensuing Covid-19 crisis.

²https://www.undp.org/sites/g/files/zskgke326/files/202212/HOSPITALITY%20AND%20TOURISM%20IN%20ALBANIA_FINAL.pdf

The sector was beginning to show gradual signs of recovery in 2021 and 2022. According to INSTAT³ data, 7.5 million tourists came to Albania during 2022, increasing by 32.6% compared to 2021. 2022 is turning just out to be one of the best years since the pandemic.

Berati is one of the most visited cities in the country due to its rich cultural and natural touristic attractions. The historical center of the city includes three museal districts, Kala, Mangalem, and Gorica, and the Medieval Center, which contains 490 cultural monuments. The historical values, the local customs, and the rich culinary offerings, along with the natural beauty of the city lying along both sides of the Osum River at the foot of Mount Tomor, are attracting more tourists. Tourism is increasing throughout all seasons, prompting many of the residents to turn their characteristic homes into guest houses, adding to their income. Entry into the Berat Castle has been free of charge since 2021. Based on the previous data generated by the electronic ticket system, which operated at the entrance from 2017 -2021, prior to the pandemic (in 2019), the number of visitors to Berat Castle was about 140.000⁴. In 2021, 76,973 visitors came to the Castle. While quantitative data is insufficient, it is estimated that visitors do not stay long and do not travel up to the Castle specifically to enjoy the restaurants, cafes, or shopping. The main attraction is the Castle, and views of the city below and mountains beyond.

1.4 Legal Framework

The projects must be developed in accordance with the Albanian legislation in force that is related to the design service with special focus on the recommendations of Law No. 27/2018 On Cultural Heritage and Museums.

2. OBJECTIVES OF THE PROJECT

The objectives and strategic priorities for improving Berat Castle’s infrastructure, public spaces, and cultural heritage are to be in line with the objectives of the Integrated Management Plan for the World Heritage property “Historic Centers of Berat and Gjirokastra.”

- **Understanding the historic built environment**
 - Comprehensively record and diagnose the physical attributes
 - Describe tangible and intangible values
 - Document the castle and its monuments to plan for future interventions
- **Improving the current infrastructure servicing the community & visitors**
 - Comprehensively record existing infrastructure
 - Address all aspects of infrastructure, including water supply and wastewater, solid waste removal, energy supply and distribution, and lighting

³ <https://www.instat.gov.al/en/themes/industry-trade-and-services/tourism/>

⁴ Electronic Ticketing system primary data.

- Investigate mobility for residents and visitors
- Prioritize interventions and anticipate future needs
- **Protecting and better utilizing the public historic context**
 - Improve the open spaces for cultural venues within the castle
 - Address issues with the main streets, walkways, and viewpoints
 - Develop better access from the lower town to the castle
- **Developing, conserving, and using existing yet underappreciated cultural resources**
 - Conserve key elements of the castle
 - Attract additional tourists (within acceptable carrying capacity limits)
 - Retain tourists for longer in the historic castle
 - Extend the visitation season
 - Impart knowledge to visitors of Berat's rich history
 - Prepare for future cultural attractions
- **Improvement of the cultural monuments**
 - Investigate issues with private and cultural property
 - Provide restoration/ conservation design for private and public buildings
 - Give recommendation on the approach/methodology to be followed for implementation of the based-on legislation in force
- **Obtaining approval from the community, stakeholders, municipality for projects**
 - Evaluate proposed interventions and assess against Outstanding Universal Value
 - Secure approval from stakeholders
- **Executing projects**
 - Develop the instruments to design and execute projects
 - Prepare the documentation & justification for future work on cultural resources
 - Support AADF during tenderin by answering questions from tenderers regarding design and presenting the project to interested companies
 - Conduct aesthetical supervision during construction

ALL PROJECTS, collectively or individually, as determined by the MECI and AADF, MUST be evaluated through a HERITAGE IMPACT ASSESSMENT that will be submitted to the Ministry responsible for Culture for submission to the World Heritage Centre of UNESCO and reviewed by the World Heritage Committee. The design or implementation of any pathways, construction, or conservation must adhere to the applicable laws of Albania.

In addition to this design task, they are also being designed; Destination Management Plan and Integrated Management Plan for UNESCO World Heritage properties - Historical Centers of Berat and Gjirokastra. The projects proposed in this design task must take into consideration the guidelines of these two plans.

3. SCOPE OF WORK

The following table lists the objectives for the project and makes a parallel list of the scope of work required to achieve the objectives.

Objectives	Scope of required work to achieve the objective
Understanding the historic built environment <ul style="list-style-type: none"> Record and diagnose the physical attributes Describe tangible values Document the castle and key sites to plan for interventions 	1. CONDUCT RESEARCH, SURVEY, DOCUMENTATION <ul style="list-style-type: none"> Conduct secondary archival research Execute primary research, field survey, including topographic survey Record project locations in detail for both interior and exterior Conduct detailed 3D photogrammetric documentation of the entire castle and hill Carry out building by building inventory, analysis, and condition assessment Perform open space and view assessments Assess hydrological and geological situation Conduct a values assessment
Improving the current infrastructure servicing the community & visitors <ul style="list-style-type: none"> Comprehensively record existing infrastructure Address all aspects of infrastructure: water supply and wastewater, solid waste removal, energy supply and distribution, and lighting Investigate mobility for residents and visitors Prioritize infrastructure interventions and anticipate future needs 	2. IMPROVE INFRASTRUCTURE <ul style="list-style-type: none"> Assess current infrastructure supplying the community and networks within the castle Describe and document all infrastructure Solid waste removal points and process <u>5 locations</u> Energy supply, electrical network, lighting, CCTV. Communication network, high-speed internet Mobility including public bus access, private vehicular access for residents/visitors, parking
Protecting and better utilizing the historic public context <ul style="list-style-type: none"> Improve the open spaces for cultural 	3. DEVELOP AND ENHANCE OPEN SPACES <ul style="list-style-type: none"> <u>Outline improvements to the public open</u>

<p>venues within the castle</p> <ul style="list-style-type: none"> • Address issues with the main streets, walkways, and viewpoints • Develop better access from the lower town to the castle 	<p><u>spaces for use as cultural event venues</u></p> <ul style="list-style-type: none"> • <u>Develop 1 public space as a temporary marketplace</u> • <u>Plan 2 pathways from the lower town to the castle</u>, thus providing alternate means of access • <u>Design 3 public toilets</u> • Design lighting paths/architectural illumination • Select urban furniture for installation along the paths outside and inside the castle (to be coordinated with interpretation planning process) • Improve universal accessibility
<p>Developing, conserving, and utilizing existing yet underappreciated cultural resources</p> <ul style="list-style-type: none"> • Conserve key elements of the castle • Attract additional tourists (within acceptable carrying capacity limits) • Retain tourists for longer in the historic castle • Extend the visitation season • 	<p>4. CREATE CULTURAL ATTRACTIONS</p> <ul style="list-style-type: none"> • <u>Develop</u> conservation design for the fortress walls to support <u>the cultural attraction project</u> • <u>Create a Wall Walk in castle wall (where applicable)</u>, including access points, safety, panels, etc. • Design wayfinding at the approaches to the castle
<ul style="list-style-type: none"> • Improvements of the cultural monuments • Investigate issues and how they impact values • Describe what investments are required • Design projects on the interventions in private housing • Give recommendation on the approach/methodology to be followed for maintenance based on legislation in force. 	<p>5. CULTURAL MONUMENTS IMPROVEMENT PROJECTS</p> <ul style="list-style-type: none"> • Identify 1st in 2nd category private houses that require structural improvement, facades, windows, doors, roofs, design restoration projects. • Identify 1st in 2nd category public buildings that require improvement • Design restoration projects for all the private houses and public objects based on their current status and need for intervention (structural, facades, windows, doors, roofs)
<p>Obtaining approval from the community, stakeholders, the municipality and the</p>	<p>6. OBTAIN APPROVALS</p> <ul style="list-style-type: none"> • <u>Evaluate interventions with a Heritage Impact Assessment, propose mitigation</u>

ministry <ul style="list-style-type: none"> Evaluate proposed interventions and assess against Outstanding Universal Value Secure approval from stakeholders 	<ul style="list-style-type: none"> Carry out consultations with the parties of interest and the community. Obtain necessary approvals according to the requirements of the legislation in force including all the documents necessary for approvals of development permission
Executing projects <ul style="list-style-type: none"> Develop executive design projects for all the sub-projects as described in the delivery section. Prepare the documentation according to the requirements of the legislation in force. Support the contracting authority during procurement of process for the constructor. 	7. EXECUTE DESIGN <ul style="list-style-type: none"> Create construction drawings, technical specifications, technical reports, and bill of quantities and all the necessary documentation for all the sub-projects tendering and construction phase; Present designs to stakeholders for all stages Concept / schematic / detailed. Assist the contacting authority during the tendering for the constructor Complete and correct the design if needed during implementation according to the scope of works
Aesthetical supervision during construction works <ul style="list-style-type: none"> Aesthetical supervision during the implementation of works Meetings with construction team Site visits during the construction phase 	8. AESTHETICAL SUPERVISION <ul style="list-style-type: none"> Propose aesthetical supervision methodology including at last 1 visit per month for a period of 2 years during the construction phase

4. TASKS-ACTIVITIES

This section goes into greater detail about the activities summarized in the matrix above. Should there be any discrepancy, this more descriptive text below takes precedence.

4.0 .Inception Phase

a. Detailed workplan

The Inception phase is intended to kick off the project, meet the clients and institutional stakeholders, and exchange contact information. It is also the time to refine the submitted

proposal, obtain initial feedback from the stakeholders, and propose questions or alternatives. If any changes occurred between the submission of the proposal, such as the substitution of key experts, this should be brought to the attention of the client. A list of all available key experts, their contact details, and letters stating their availability to work on the project are required. A detailed workplan describing all phases of the work, field visits, and activities is necessary. *Actual dates of deadlines* for deliverables, meetings, and presentations must be included. If there are any questions concerning the schedule, they should be proposed in this inception phase.

4.1 Conduct Research, Survey, and Documentation

Conduct secondary (desk) research that will complement and inform later primary research (field) to inform the project collecting archival materials from state institutions, government agencies, municipality, and academic sources. This includes cadastral maps, deeds, property boundaries, World Heritage boundaries, buffer zones, World Heritage Committee decisions, and any Reactive Monitoring Mission reports workshops, and recommendations the current status of the cultural assets in the castle including private, public and religious as well as castle walls. This also includes an examination of the Master Plan for Berat and all former and future Master Plans. In addition to the cadastral maps, there must be a study of the existing plans and projects regarding the urban heritage, parks, and transportation networks, along with any infrastructure plans by the city. The other ongoing plans for Berat, such as the parallel project related to the Destination Management Plan (DMP) for Berat and the Integrated Management Plan (IMP), must be studied, and their findings must be incorporated into this project.

a. Values assessment

An assessment of the values, potentials, risks, and current state of the existing and planned projects is required, given that Berat is a World Heritage property. A comparative study with the current values against those included in the World Heritage criteria of Outstanding Universal Values is expected. This can be accomplished through interviews with municipal planners, decision-makers, community members, and other stakeholders. A detailed analysis of the historic urban landscape of Berat with its urban, architectural, and landscape values is also expected with a review of UNESCO's Historic Urban Landscape approach. All Reactive Monitoring Mission, Advisory Missions, World Heritage Committee decisions, and other reports available on UNESCO's website must be included in this assessment.

4.2 Improve Infrastructure

It is necessary to understand the public property investments required to improve the quality of life for the community and the experience for visitors. All public property is to be studied for ownership (State, municipality, etc.), boundaries, access, and other information. This is to include a detailed study of the existing pathways from the lower neighborhoods to the Castle. This will include possible new pathways to connect to other cultural assets, i.e., St. Michael's Church and lower fortifications near the river. Also necessary is a study of the parking areas and vehicular approaches to the castle. Parking should be disbursed to avoid large areas of cars. Studies should also include drop-off areas for busses. Hydrological and

geological assessment of the castle must also be undertaken along with an assessment of the infrastructure, water supply, wastewater, solid waste, electrical systems, etc. These studies will aid in determining the priorities for investment.

4.3 Develop and Enhance Open Spaces

There are several open spaces within the castle that are currently underutilized. These spaces are listed with a map in this ToR. One open space near the main gate is currently used for events, but the frequency and type of events are unknown. This task is to identify and propose three open spaces for development and enhancement for use as cultural venues. The spaces listed in this ToR are to be analyzed for carrying capacity, access, noise levels, access to utilities, etc. Necessary improvements to use these spaces are to be proposed. Such improvements include access to utilities, temporary seating, storage of items necessary for events, electrical and lighting distribution, etc. A preliminary budget is also to be developed. These spaces are to be conceptually designed and presented to stakeholders.



Main Gate, the space is currently used for small venues but has greater potential. Also close to parking and bus access

This large, sloped area with a flat platform viewing the **Trinity church** is ideal for larger concerts given the excellent visibility and isolation from residential areas.

The Citadel. Two large areas can be used as venues for events. Largely isolated from residential areas, but somewhat further from vehicular access.

The Cistern, is largely underground and might become a museum in the future. In the surrounding area there is a mosaic covered for conservation purposes and a building that serves as water supply station.

Garden, Sant George Church . The area in front and the rear can be used for small informal gatherings as the space for modular market. A popular location as the viewing platform is nearby.

Satellite map with identification of open spaces to be considered for areas to be investigated and designed for possible cultural venues (CNES, Airbus, Maxar, 2022)

4.4 Improvements of The Cultural Monuments

The castle has a total 148 (one hundred and forty-seven) registered cultural monuments, including the fortress walls ,20 of those are of 1-st category among which 15 are religious objects and the other 128 of 2nd category mostly private houses and some businesses. Some of these properties are restored by the owners and others are in different stages of degradation and in need of intervention.

According to the information gathered during the preparation of Destination Management Plan for Berat Castle ,**13 (thirteen)** monuments appear in **very good condition**. **81(eighty-one)** monuments appear in good condition but **need light** interventions for windows, facade and roof tiles. **34 (thirty-four)** monuments appear in poor condition and need **interventions for the improvement** of the roof, windows, facade, walls on the ground and upper floors. **13 (thirteen)** monuments are in a state of risk up to the **risk of collapse**.**5 (five)** monuments appear in a **state of ruin**. (Please refer to the map ANNEX II)

Detailed information on the current status of the monuments will be collected on site and documented in the individual file of each monument, which are administered by the local Directorate of Cultural Heritage, responsible for cultural monuments and the historic area.

Following the identification process, conservation and protective intervention projects will be developed for all cultural monument properties—both public and private—based on their current condition and intervention needs (including structural elements, façades, windows, doors, and roofs), along with a preliminary budget.

During this process, an assessment will be conducted to determine how the current condition of each property affects its universal values. Additionally, recommendations on the appropriate maintenance approach and methodology—aligned with the legislation in force—will be provided

4.5 Public Service and Access

As part of this task, the project should also address the following components:

- a) **Development of an open public space** designed as a temporary and flexible market area that allows local merchants to display and sell their products under optimal conditions.
- b) **Design of three new pedestrian paths**—or improvement of existing ones—from the neighborhoods below the castle, with particular attention to safety, security lighting, and accessibility.
- c) **Design of public toilets** in at least three strategic locations, based on calculations of maximum visitor capacity and in compliance with universal accessibility standards.
- d) **Architectural and artistic lighting** of the castle walls and interior, aligned with international guidelines for lighting historical sites and coordinated with the site's interpretation project.
- e) **Proposal of an urban furnishing manual**, including signage, that aligns with the interpretation project and complies with legal requirements for historical areas.

4.6 Create Cultural Attractions

To propose concepts for cultural attractions. This includes the research of buildings/monuments for the placement of these activities, an analysis of each structure and their connection to PMD and PMI. The essential cultural attractions to develop in this task include

- a. **Walking on the wall:** The itinerary can be considered to be placed on the perimeter of the surrounding walls (partially), proposing observation points to access the panorama of the lower districts of the city. The proposal should take into consideration the conservation status of the walls, the bearing capacity and safety.

5. HISTORIC IMPACT ASSESSMENT

An assessment of the values, potentials, risks, and current state of the existing and planned projects is required, given that Berat is a World Heritage property. A comparative study with the current values against those included in the World Heritage criteria of Outstanding Universal Values is expected. This can be accomplished through an assessment of the impact of the proposed projects on Berat's values and how these projects impact those values. Mitigation measures are expected to be included.

This is to be a report following the ICOMOS Guidelines sufficient to be submitted to the Ministry of Culture for submission to the World Heritage Centre of UNESCO.

118bis. Notwithstanding Paragraphs 179 and 180 of the *Operational Guidelines*, States Parties shall ensure that Environmental Impact Assessments, Heritage Impact Assessments, and/or Strategic Environmental Assessments be carried out as a pre-requisite for development projects and activities that are planned for implementation within or around a World Heritage property. These assessments should serve to identify development alternatives, as well as both potential positive and negative impacts on the Outstanding Universal Value of the property and to recommend mitigation measures against degradation or other negative impacts on the cultural or natural heritage within the property or its wider setting. This will ensure the long-term safeguarding of the Outstanding Universal Value, and the strengthening of heritage resilience to disasters and climate change.

Paragraph 118bis. Decision 43 COM 11a of the World Heritage Committee - Operational Guidelines to the World Heritage Convention, 2021, page 36

In addition, "UNESCO and the Advisory Bodies to the World Heritage Committee have issued new guidance for assessing impacts from projects that could potentially affect the planet's most precious heritage places. Designed specifically for heritage management institutions,

governments, and project developers, it aims to help find the best possible solutions to meet both conservation priorities and development needs.

While new projects and infrastructures can be crucial for economic and social development, they can also have negative impacts on World Heritage sites’ “Outstanding Universal Value” – the unique qualities for which they receive World Heritage status.”

The guidance concerning Heritage Impact Assessment can be downloaded from the ICOMOS Open Archive:

<https://www.icomos.org/en/home-wh/108301-new-guidance-set-to-help-reduce-impacts-from-development-on-world-heritage-sites>

State Parties have an obligation to notify the UNESCO World Heritage Center in advance before considering any proposed action that may have an impact on World Heritage.

This applies to any proposed action that could reasonably be expected to affect the World Heritage property’s Outstanding Universal Value, whether the property itself, its buffer zone or the wider setting. The World Heritage Committee or the UNESCO World Heritage Centre may also request that an impact assessment be prepared and submitted, which should be done before any irreversible decisions are taken. The impact assessment should inform the decision to proceed with a proposed action or not, so a decision should never be taken before the assessment, or influence its outcome. Operational Guidelines paragraph 110.

6. DELIVERABLES

Submissions MUST be labeled as per this table.

Components	Task/Format	Notes
0. INCEPTION PHASE		
a. Detailed work plan Inception Report	a. Prepare a detailed Workplan in a Gantt chart showing phases of the work, subphases, and deadlines (actual dates) for deliverables b. Conduct a kickoff meeting with the stakeholders	

Components	Task/Format	Notes

6.1. RESEARCH, SURVEY, and DOCUMENTATION		
A. Secondary research	<ul style="list-style-type: none"> a. Conduct secondary (desk) research that will complement and inform primary (field) research b. Examination of the current, past, and future Master Plans for Berat, the IMP, Tourism Strategy, and nomination dossier c. Study of plans and projects regarding the cultural heritage, past conservation works, parks, and transportation, infrastructure, etc. d. Create a bibliography or list of past projects e. Review and incorporate the findings from the parallel DMP and IMP plans into this study 	This work can start and continue in parallel to the review period of the Inception Phase and during the primary research and documentation on site.
B. Primary research, survey, and documentation	<ul style="list-style-type: none"> a. Detailed 3D photogrammetric documentation of the entire castle, buildings, and key structures at a GSD of 8 cm minimum. Mapping must capture 95% of vertical elements and extend down to the bottom of the hill and start of the lower town. b. 2D CAD mapping on an orthophoto including DTM with contour lines at 25cm projected to the Albanian projection system c. Reports for hydrological/geological situation d. Detailed building by building inventory, analysis, and condition assessment on a defined form e. Document open spaces, public roads, views, and paths to the lower town f. Environmental impact assessment g. Energy efficiency assessments for all the building if required; 	Presentations are designed at the end of each major task. but consultants may be required to present multiple times depending on the project needs
C. Values assessment	<ul style="list-style-type: none"> a. Assessment of values and risks to OUV b. Analysis of the historic urban landscape c. Comparative study of World Heritage criteria d. Review the ongoing Integrated Management Plan for the World Heritage property 	
D. Document	<ul style="list-style-type: none"> a. Document buildings in 3D with 	

projects	photogrammetry and/or laser to execute later conservation and protective interventions.	
Presentations and report deliveries	Presentation, technical report	

6.2. IMPROVE INFRASTRUCTURE		
A. Assess current infrastructure	a. Conduct comprehensive survey and description of the current state of infrastructure	
B. Solid waste removal points and process	a. Map the areas of solid waste local disposal within the castle for both residents, businesses (particularly restaurants), and visitors. This includes local rubbish bins and collection points b. Chart the removal from the castle with timeframe for collection and transportation to municipal services, recycling, or landfill c. Assess the adequacy and provide recommendations for improvement d. Design intervention projects	Portions of this task can be parallel or combined with the earlier task of documentation of the historic site
C. Fresh water supply, wastewater, and drainage	a. Assess and map the fresh water supply in terms of quality, quantity, connections, from the municipal supply to network within the castle. b. Assess and map the wastewater supply from within the castle to the municipal or local onsite treatment – compare to current code c. Map and analyze the storm water drainage d. Some new system for water supply, wastewater, and drainage may exist e. Describe priorities for interventions and describe the impacts to the historic streets, provide recommendations, future needs f. Design intervention project	
D. Energy supply, electrical	a. Assess the electrical and other energy supplies into the castle b. Describe the system, create maps,	Work on each aspect of the improving infrastructure to be

network, public lighting	<ul style="list-style-type: none"> c. distribution points, and overall network c. Describe priorities for interventions and describe the impacts to the historic streets, provide recommendations, future needs. d. Design intervention project 	developed to into a concept design with budget for stakeholder decision making. Based on the technical report at the end of the task, all or particular aspects to be selected for implementation.
E. Communication network, high-speed internet	<ul style="list-style-type: none"> a. Analyze the existing Internet access, speed, connectivity, type (optical fiber, wifi, wireless, towers, signal strength, etc.) b. Design intervention project 	
F. Mobility	<ul style="list-style-type: none"> a. Study the mobility outside, approach, and access into the castle, identify bottlenecks, issues b. Map public bus access, private vehicular access for residents/visitors, parking c. Study of the parking areas and vehicular approaches to the castle d. Include Universal Access assessment e. Design intervention project 	
Budget	Provide preliminary budget for all the intervention projects	
Presentations and report delivery	Presentation and technical report	

6.3 DEVELOP AND ENHANCE OPEN SPACES		
A. Outline improvements to public open spaces for use as cultural event venues	<ul style="list-style-type: none"> 6.4 Outline improvements to <u>public open spaces</u> for use as cultural event venues, design intervention project. 6.5 Design lighting paths/architectural illumination 6.6 Select urban furniture for installation along the paths outside and inside the castle 6.7 Improve universal accessibility 	
B. Develop 1 public space as a marketplace	<ul style="list-style-type: none"> a. <u>Identify 1 public space do be used for a modular /movable marketplace</u> b. Design conceptually how this space will function and what improvements are required c. Design the market furniture d. 	
C. Plan pathways	<ul style="list-style-type: none"> a. Study of the existing and new 	

from the lower town to the castle	<p>possible pathways from the lower neighborhoods to the Castle. This will include design of new pathways or improvements in existing pathways</p> <p>b. Map visitor access and how visitors can be encouraged to take alternative paths for views and access to other cultural resources i.e., St. Michael's Church and lower fortifications near the river, on west side of the ramparts, etc.</p> <p>c. <u>Design 3 new approach pathways to the castle</u></p>	
D. Design public toilets	a. <u>Design for 3 public toilets</u> , either new buildings or within existing public buildings	This work can be conducted in parallel with other tasks
E. Design lighting, architectural illumination	<p>a. Investigate existing lighting and electrical supply</p> <p>b. Design safety lighting for night access to the castle and within the castle</p> <p>c. Design architectural illumination to encourage night tourism at the base of the fortifications, highlight the viewing platform, ramparts, etc.</p>	
F. Select urban furniture	a. Select or design urban furniture along the new or existing paths of the castle.	
G. Create wayfinding signage/ didactics for visitation	<p>a. Create wayfinding signage/didactics for visitation for use along the access paths, within the lower town to direct visitors and within the castle</p> <p>b. Create directional signage for private vehicles and public transportation</p>	Signage for cultural monuments or interpretation is not included in this task
H. Improve Universal Accessibility	a. Design all spaces to incorporate Universal Accessibility or alternative means of access to ensure inclusivity	
Budget	Provide preliminary budget for all the intervention sub- projects	
Presentations and report delivery	Presentation and technical	

6.4 PROPOSE NEW CULTURAL ATTRACTION		
A. Develop conservation	<ul style="list-style-type: none"> a. Conservation of key elements of the fortifications b. Design Conservation project c. Provide and preliminary budget 	
I. Wall walk design	<ul style="list-style-type: none"> a. Design where feasible around circuit of the ramparts of Berat castle, including guardrails, handrails, and signs, etc. b. Study access points, safety, panels, etc. c. Provide preliminary budget 	

6.5 IMPROVEMENTS OF THE CULTURAL MONUMENTS		
A. Study cultural monuments to identify needs for improvements	<ul style="list-style-type: none"> a. Identify the monuments that need improvements of facades, windows, doors and roofs, in the framework of the unification build heritage of the universal value. b. Identify buildings that require constructive intervention in the framework of the unification of the build heritage of the universal value. c. Identify interventions that damage the universal value, including water heating systems with solar panels, deposits, etc. 	<p>This work can start and continue in parallel to the previous phases particularly the documentation tasks</p> <p>Including the files of the monuments administrated by the local cultural heritage institutions.</p>
b. Design projects for cultural monuments improvements	<ul style="list-style-type: none"> a. Restauration, conservation and protective intervention design projects that include improvements of facades, windows, doors and roofs for public and private buildings as per identified need. b. Restauration conservation and protective intervention design projects for monuments that require constructive intervention in the framework of the unification of the build heritage of the universal value. 	Individual design projects are to be executed
Budget	Provide preliminary budget for all the intervention sub-projects.	
Presentations and	Presentation and technical report	

report delivery		
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6.6 OBTAIN APPROVALS		
A. Heritage Impact Assessment	<ul style="list-style-type: none"> c. Evaluate interventions with Heritage Impact Assessment – complete HIA begun earlier d. incorporate any changes required by the World Heritage Centre UNESCO and ICOMOS 	
B. Obtain approval from authorities for the concept designs	<ul style="list-style-type: none"> a. Obtain official approvals for all concepts and projects, according to the requirements of the legislation in force, including those from the community, and other stakeholders b. To include all the changes requested by the Albanian authorities, stakeholders and the community 	
6.7 EXECUTE PROJECTS		
A. Concept Design	<ul style="list-style-type: none"> a. Develop Concept designs for all the sub- projects b. If any additional work on concept designs to reflect comments from stakeholders is required, it should be done at this point. 	Sub- projects are described in deliverables section: point 6.2 / 6.3/6.4/ 6.5
B. Schematic Design	<p>This task involves the detailed development of all the aforementioned projects, advancing each from concept to schematic design level in preparation for implementation. Comprehensive presentations are required for each sub-task. The scope includes, but is not limited to:</p> <ul style="list-style-type: none"> a. Preparation of schematic designs for each sub-project. b. Inclusion of site planning, functional layouts, material proposals, and safety features in all designs. c. Specification of materials for paving, walls, fences, and gates, supported by sample materials and material boards, with a strong emphasis on the use of traditional paving materials. d. Design of urban furniture, such as benches, waste receptacles, and other 	

	<p>elements, with visual examples.</p> <p>e. Incorporation of appropriate safety measures, including handrails and guardrails, where needed.</p> <p>f. Development of a landscaping schematic design (in AutoCAD), specifying plant species, planting layouts, and irrigation systems.</p> <p>g. Lighting design for both functional and aesthetic purposes, including security lighting.</p> <p>h. Schematic design of public toilets.</p> <p>i. Production of 3D computer renderings to visually represent key interventions.</p> <p>j. Preliminary Heritage Impact Assessment to evaluate the potential impact of proposed interventions on the site's cultural and historical values.</p>	
C. Design Development	<p>The following deliverables are expected during the detailed design phase:</p> <p>a. Development of detailed designs in AutoCAD and PDF formats, incorporating 3D simulations and renderings, and reflecting feedback received from relevant institutions.</p> <p>b. Cost estimates for each urban pathway segment, calculated per square meter and presented in Excel format.</p> <p>c. Code and regulatory compliance analysis, prepared in accordance with Albanian legislation, and submitted in Word format.</p> <p>d. Preparation of an Environmental and Social Impact Assessment (ESIA) for all proposed interventions.</p> <p>e. Preparation of a Heritage Impact Assessment (HIA) to evaluate and mitigate potential impacts on the site's cultural and historical values.</p>	<p>Upon approval of the schematic Design,</p>
D. Final design, construction documents	<p>a. The final design (Autocad, PDF) incorporating comments of previous submissions, 3D computer models to present the final design</p> <p>b. Technical report on proposed interventions</p>	

	<p>Detailed written and visual description (technical report) of the proposed interventions for the improvement of the building state and functional areas</p> <p>c. Drawings - 2D technical drawings (site plans, plans, sections, elevations, and detailed drawings in relevant scales from 1/100 to 1/5) for construction. (Autocad)</p> <p>d. Technical Specifications, 3-part format</p> <p>e. Bill of Quantities (Excel)</p> <p>f. Bidding documents, including an application for the building permits, instructions to bidders, and outline healthy and safety⁵ The consultants will be responsible for the design but not required to supervise or observe the actual works unless an addendum contract is requested by the contracting authority. The supervisor of the works will be determined</p> <p>g. Drawings, Specifications, and BoQ are to be interconnected with a unique keynote system</p>	
E. Assist in the constructor procurement process	<p>a. Hand over the designs.</p> <p>b. Respond to technical request during the procurement process</p>	
F. Aesthetical supervisions during the construction phase	<p>a. Propose aesthetical supervision methodology including at last 1 visit per month for a period of 2 years during the construction phase</p>	

7. REQUIRED COMPETENCIES

AADF is seeking a company, local or international, that demonstrates the required competencies through its previous experience and the proposed team members. The applicant and the team must show proven experience in heritage projects and historical center development, as well as the technical capacity to support project implementation.

7.1 Certification and Licenses

The proposed team must demonstrate relevant professional experience and hold all licenses required by current Albanian legislation, in accordance with their field of activity, as follows:

- **Project Design Licenses:** Categories 2a, 2b-1, 2d, 3a, 3d, 4c, 4f, 4i, 4j, 5b, 5c, 6a, 8a, 8b, 8e
- **Restoration Design Licenses:** Categories PA1, PA2, PA3, PA4, PA5, PA6, PA7
- **Archaeological Design Licenses:** Categories A1, A2

7.2 KEY EXPERTS - REQUIRED QUALIFICATIONS AND EXPERIENCE

1. Team Leader

Demonstrate:

- A minimum of 10 years of proven professional experience in planning and/or design within the field of cultural heritage
- Successful leadership in at least three (3) projects related to the conservation, restoration, and/or management of historical urban contexts
- Active participation as part of the design team in implemented projects across at least three (3) cultural sites or historic cities, including at least one (1) located within a UNESCO World Heritage site
- Excellent written and spoken communication skills in both English and Albanian
- Knowledge of medieval and Byzantine architecture, and familiarity with the specific characteristics of Berat Castle (considered an asset)

The Team Leader must also be available to work on-site and attend meetings with key stakeholders as frequently as needed.

2. Construction Engineer

Demonstrate:

- A minimum of 10 (ten) years of experience in designing for structural stabilization and sensitive interventions
 - In-depth knowledge of historical construction, conservation, and restoration methods
 - Experience in working with cultural heritage structures; experience in UNESCO World Heritage cities is considered an asset
 - Involvement in at least three (3) completed structural intervention projects in cultural heritage sites
 - Experience in risk assessment
-

3. Restorer

Demonstrate:

- A minimum of 5 (five) years of professional experience in restoration work
 - Participation as part of the design team in implemented projects across at least three (3) cultural sites or historic cities, including at least one (1) located within a UNESCO World Heritage site
 - Specialization in the medieval and/or Byzantine period
 - Previous professional experience in designing projects for or within Berat (considered an asset)
 - Possession of the relevant license(s) to perform design work on cultural heritage properties, in accordance with Albanian legal requirements
-

4. Infrastructure Engineer

Demonstrate:

- Experience in working on cultural heritage structures; experience in UNESCO World Heritage cities is considered an asset
 - A minimum of 10 (ten) years of experience in structural stabilization and sensitive interventions
 - Knowledge of historical construction, conservation, and restoration methods
 - Involvement in at least three (3) completed infrastructure projects in urban cultural heritage sites
-

5. Landscape Architect

Demonstrate:

- A minimum of 5 (five) years of experience in urban revitalization projects
 - Experience in designing low water consumption landscapes, irrigation systems, and low-maintenance solutions
 - Experience in designing urban lighting within the context of historic cities
 - Possession of the relevant professional license(s) required under Albanian legislation for landscape architecture
-

7.3 NON-KEY EXPERTS - REQUIRED QUALIFICATIONS AND EXPERIENCE

1. Hydrotechnical Engineer

Demonstrate:

- Experience in working on cultural heritage structures; experience in UNESCO World Heritage cities is considered an asset
- Knowledge of historical construction, conservation, and restoration methods

- Involvement in at least three (3) completed hydrotechnical projects implemented as part of interventions in urban cultural heritage sites
 - Experience in risk assessment
-

2. Electrical Engineer

Demonstrate:

- Experience in working on cultural heritage structures; experience in UNESCO World Heritage cities is considered an asset
 - Involvement in at least three (3) completed electrical projects implemented in urban cultural heritage sites
 - Experience in risk assessment
-

3. Urban Planner

Demonstrate:

- A minimum of 5 (five) years of experience in designing projects related to historical urban contexts
 - Involvement in at least one (1) design project within a UNESCO World Heritage site
 - Knowledge and experience in designing cultural heritage projects in Albania, with specific understanding of historical cities
 - Familiarity with the specific characteristics of Berat Castle (considered an asset)
 - Possession of the relevant professional license(s)
-

4. Archaeologist

Demonstrate:

- A minimum of 5 (five) years of experience in the field of archaeology
 - Possession of a valid license for archaeological activities in cultural heritage properties, in accordance with Albanian legal requirements
 - Experience in historical cities in Albania
 - Specialization and/or experience in the medieval and Byzantine periods
 - Previous professional experience in Berat and in UNESCO World Heritage cities (considered an asset)
-

5. Surveyor

Demonstrate:

- Advanced knowledge in 3D data collection and processing methods
 - A minimum of 5 (five) years of experience conducting surveys in urban areas
 - Experience in projects related to historic cities and cultural heritage areas
 - Expertise in aerial photogrammetry
-

6. Costing Engineer

Demonstrate:

- A minimum of 10 (ten) years of professional experience as a costing engineer in construction and/or restoration projects
 - Previous experience in cultural heritage projects (considered an asset)
-

8. Organization of the work

The organization of the work will be reported to the Albanian-American Foundation for Development. The presentations, as agreed in the schedule of deliverable products, will be sent to the Ministry and Berat Municipality. Dates and times of the presentations will be coordinated MECI and the Municipality by the AADF. The consultant must keep minutes of meetings, meetings and presentations to be submitted within five days.

8.1 Reporting requirements

The reports will cover all the deliverables described above:

- Concise reporting with detailed and regularly updated work plans
- Monthly progress reports related to the implementation of the project and reporting on the provision of technical support throughout the duration of the contract.
- Reports about field missions
- Meeting minutes for all face-to-face or online meetings
- Images, videos, maps or other documents collected during the project
- Complete bibliography with notes and links, original source documents, etc.
- PowerPoint presentation materials.
- Comprehensive final report covering all activities and products with visual documentation.

Reports must be submitted in their original digital format, Word, PowerPoint, AutoCAD, etc., with a PDF copy.

8.2 Responsibilities of the Consultant.

- The Consultant should ensure:
- Implementation of the project according to the ToR and the approved work plan in regular consultation and coordination with AADF and project stakeholders.
- Efficient implementation of project activities as per project time line.
- Review of project time line, site plans, presentation resource materials, agenda/content methodology.
- Coordination with AADF and responsible institutions for additional resources and logistical arrangements that may be required for the development and implementation of the Work Plan.
- Providing advice to institutions for the implementation of activities when necessary.
- Providing technical support for reporting to ensure compliance with all laws.
- The Consultant has the obligation to respect the Albanian legislation on cultural heritage in force and its by-laws
- The Consultant is responsible to follow the procedure and to comply with all the rules for the approval of the project by national decision-making bodies.

ANNEX 1

OBJECTIVES OF THE INTEGRATED MANAGEMENT PLAN OF CULTURAL PROPERTY GJIROKASTER - BERAT

Long term goal:

The construction, location and scale of buildings and infrastructure respect the historical, cultural and landscape values of the World Heritage Site.

Specific objectives to be achieved in the next 7 years:

- The plans/regulations for **the administration and the technical guides on the ways of intervention** in the historical centers are updated and implemented, including the clear definition of the competences of the institutions responsible for cultural heritage and territorial planning, risk preparedness, emergency management and strategies (tools) **mitigation, energy efficiency, access for people with disabilities, auxiliary infrastructure, etc.**
- Heritage impact assessments should be a necessary prerequisite for development projects and directly related to the provisions of the regulations of Berat and Gjirokastra, following the assessment conclusions should be provided by national legislation.
- Illegal structures and buildings are to **be inventoried, categorized to enable the determination of the type of intervention for their rehabilitation, restoration, demolition, etc.**
- Traffic, transport and transport infrastructure are managed with an emphasis on the protection and security of the landscape.

ANNEX II

BERAT CASTLE MAPS



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