

Terms of Reference (TOR)

For provision of services related to consulting support for clean-tech readiness and quality infrastructure assessments and policy dialogues in Barbados

UNIDO Project Title: “Strategic platform to promote sustainable energy technology innovation, industrial development and entrepreneurship in Barbados” (ID 150123)

22 February 2021

1. Introduction

The United Nations Industrial Development Organization (UNIDO), the Ministry of International Business and Industry (MIBI), the Barbados Investment & Development Corporation (BIDC) and the Clean Tech Cluster Barbados (BLOOM) are jointly implementing the Global Environment Facility (GEF) funded project “Strategic platform to promote sustainable energy technology innovation, industrial development and entrepreneurship in Barbados”. The project contributes to the implementation of the National Strategic Plan 2005-2025, which aims at making Barbados a “green circular economy” and the “most environmentally advanced green country in Latin America and the Caribbean”.

The development of a “clean-tech market” in Barbados requires an equilibrium between demand and local supply of green quality products and services. However, currently the capacities of the local private sector to deliver these products and services are limited. Barbadian clean-tech businesses and start-ups face manifold barriers related to policy and regulation, knowledge, capacity, as well as access to R&D, quality infrastructure and finance. Moreover, there exists only a very limited coordination and cooperation within the sector.

Therefore, the GEF Project aims to strengthen the local supplier-side and the creation of an enabling environment for clean-tech entrepreneurship and innovation. Specifically, the project:

- a. establishes a national public-private policy dialogue platform to promote coherent demand and supplier-oriented cross-sectoral policies, regulations and incentives;
- b. establishes the *BLOOM – Clean Tech Cluster Barbados*, which will act as one-stop shop and provide customer-oriented services to its members (e.g. information exchange, training, applied R&D, entrepreneurial support, shared facilities, matchmaking and networking, lobbying & advocacy, fund raising, joint tendering & sourcing, joint project, product and patent development, market intelligence and export promotion);
- c. promotes joint ventures between the cluster members and entrepreneurs, investors, venture capitalists, financiers in the Caribbean, other SIDS and internationally (incl. the diaspora);
- d. creates an entrepreneurship facility which will provide various financial/insurance products for the commercialisation innovative business ideas and industrial up-grading;
- e. contributes to the creation of qualification and certification frameworks for personal, products and services and provide targeted training to current and future members of the cluster;
- f. supports also the efforts of the Caribbean Centre for Renewable Energy and Energy Efficiency (CCREEE) to establish a regional program on sustainable energy and climate technology innovation and entrepreneurship for the Caribbean Community (CARICOM). The CCREEE is situated in Barbados.

The GEF project has achieved laudable progress. With support from UNIDO, the Barbados Cleantech Cluster (BLOOM) has become fully operational in 2020. It is hosted by BIDC and has already

established a broad range of international partnerships. It has also launched its incubation program, which offers mentoring services to a number of clean-tech businesses and start-ups. The BLOOM website is available at: www.bloomcluster.com. Further information on the GEF-UNIDO project is available at: <https://open.unido.org/projects/BB/projects/150123>.

2. Objectives and deliverables of the assignment

The strengthening of public-private dialogue, the creation of an enabling policy and regulatory framework and the enhancement of quality infrastructure for clean-tech products and services, were identified as important fields of intervention of the GEF project. These areas were identified as major barriers for the further uptake of market demand and the expansion of local clean-tech manufacturing and servicing. Further details are available in the barrier analysis included in the CEO Endorsement Document and the undertaken Sustainable Energy Industry Market Assessment (SEIMA).

In the mentioned areas, the envisaged GEF project activities include the establishment of a public-private dialogue platform, the organisation of regular policy dialogues and the development of proposals to improve supplier-oriented policies, legislation, incentives and quality standards. In this context, UNIDO and its partners are seeking consulting support from a qualified company or institution. The contractor will work closely with MIBI and BLOOM/BIDC, which are the final direct beneficiaries of the consulting services. Moreover, the contractor will coordinate with relevant international partners (e.g. UNDP, IADB, IRENA), including the Partnership for Action on Green Economy (PAGE).

The assignment requires the coverage of a broad range of clean-tech products and services in the energy and environmental sector (e.g. renewable energy, energy efficiency, waste disposal, treatment and recycling, circular economy) and related business models. The sector is also closely attached to the growing field of industry 4.0 solutions (e.g. digitalisation, artificial intelligence, internet of things, cyber-physical systems, robotics, big data and new visualisation models).

3. Scope of work, time and payment schedule

Specifically, the assignment of the contractor will have the following scope of work and deliverables below:

TASKS	DELIVERABLES	EXPECTED WORKING DAYS/Units	TENTATIVE PAYMENT SCHEDULE
1. <i>Inception Report (IP) and literature/data review</i>	Inception report to be approved by UNIDO, MIBI, BLOOM/BIDC (incl. detailed activity plan, time schedule, list of key literature and stakeholders, schedule of stakeholder workshops and meetings, data collection and methodologies, tables of contents and software/tools to be used). The contractor will harmonize the work plan with the consulting team assisting BLOOM to develop the <i>Barbados Clean Tech Industry Report and Tracking Framework</i> . The report will be developed in parallel to this assignment.	10 w/d	10% upon approved IP report
2. <i>Design of the Clean Tech Industry Platform</i>	In line with the GEF CEO Endorsement Document, the contractor will develop a <u>concept note for the envisaged cross-sectoral Clean Tech Industry Platform</u> , which will facilitate public-private coordination, cooperation and dialogue on future-oriented issues and projects. The design will be closely coordinated with the relevant public and	15 w/d	20% upon approval of work

private key stakeholders (e.g. BLOOM/BIDC, MIBI, other Ministries, industry player, university, standard organizations and international partners). The proposed institutional and technical design of the platform will be validated during a joint workshop organized by BLOOM. Due to COVID-19 the workshop might be held by online-means. The contractor will prepare the required contents (e.g. agenda, documentation, meeting minutes). BLOOM and UNIDO will cover other organizational matters and meeting costs. The concept note on the platform (max. 10 A4 pages) will be provided by the contractor fully edited, designed (incl. graphs).

<p>3. <i>Organization of a dialogue series on clean-tech entrepreneurship and innovation</i></p>	<p>As part of the industry platform activities, the contractor will organize a <u>series of policy dialogues on clean-tech entrepreneurship and innovation</u>. The events will feature the participation national, regional and international speakers from the public and private sector, including from other clean-tech hubs and clusters. The series will comprise three (3) dialogues and will be organized in close cooperation with BLOOM/BIDC, PAGE and CCREEE. Potential synergies to planned regional CCREEE events will be harnessed. Due to COVID-19, the series might be held online or in mixed form. The contractor will have the lead responsibility for the development of the agenda, list of speakers, follow-up on invitations, as well as the development of reports and press releases. Recordings of the events will be disseminated through the BLOOM and other portals. The contractor will provide the webinar platform and cover related costs through the contract. All other event costs will be covered by UNIDO (e.g. travel, accommodation for speakers). The BLOOM cluster team will support the contractor in the organization of the dialogues.</p>	<p>20 w/d</p>	<p>20% upon approval of work</p>
<p>4. <i>Development of the Barbados Clean Tech Policy Readiness Assessment and identified priority proposals</i></p>	<p>The contractor will develop the <u>Barbados Clean Tech Policy Readiness Assessment</u>, which will analyze the coherence and “local supplier friendliness” of existing clean tech policies and regulations (incl. related cross-cutting policies). The assessment will identify gaps and <u>make at least thirty (30) concrete proposals</u> on how to better incentivize the participation of the local industry in clean tech manufacturing and servicing value chains. The assessment will also shed light on how clean tech products and services can be better promoted through cross-cutting policies (e.g. construction, fisheries and agro-processing, tourism, transport, waste management, as well as water/desalination). The contractor will support BLOOM in the further detailing of ten (10) policy and/or legal proposals, which will be brought to the attention of relevant policy and decision-makers for consideration (e.g. changes in laws, policies). To identify gaps and needs, the contractor will undertake broad stakeholder consultations with the local clean tech</p>	<p>30 w/d</p>	<p>20% upon approval of work</p>

industry and associations (e.g. BREa). The assessment report (max. 30 A4 pages, excl. annexes) and the ten policy proposals will be provided by the contractor fully edited, designed (incl. graphs) and ready to be published in English.

5. <i>Development of the Barbados Clean Tech Quality Infrastructure Assessment and proposals for priority standards</i>	The contractor will develop the <u>Barbados Clean Tech Quality Infrastructure Assessment</u> . It will provide an overview on the existing national quality infrastructure, actors and processes for products and services, including accreditation, certification, standards, testing, inspection, metrology, and quality management systems. Moreover, the assessment will provide practical recommendation on how to improve the current framework and the potential role of BLOOM regarding standard development, assurance and enforcement. The contractor will identify at least ten (10) standards for products and services, which are of high priority for the local clean tech industry. A short description of these standards will be included in the assessment report. The proposed standards will be further developed by BLOOM and relevant quality infrastructure institutions. As a first step, the contractor will provide a table of content and the assessment framework for approval by UNIDO, MIBI and BLOOM/BIDC. The assignment requires broad consultations with the local clean tech industry and quality infrastructure institutions. <u>The report and the summary document (max. 50 A4 pages in English, excl. annexes) and the ten standard proposals will be provided by the contractor fully edited, designed (incl. graphs) and ready to be published in English.</u>	30 w/d	30% upon approval of work
6. <i>Participate in various stakeholder consultations and meetings</i>	Apart from face-to-face consultations, it is estimated that active participation in eight consultative meetings (3 hours each) will be required. Physical presence of a local consulting expert is a requirement.	15 w/d	
TOTAL		120 w/d	

The activities under this contract shall be completed within a period of eight (8) months from the effectiveness of the contract. Additionally, due to the COVID-19 travel restrictions, it is essential that the contractor employs local experts working from Barbados (local consulting fees apply). The employment of local experts is a precondition. The proposed plan for implementation of activities and deliverables:

Deliverables	Months							
	1	2	3	4	5	6	7	8
Deliverable 1 – Inception report								
Deliverable 2 – Concept for a cross-sectoral clean-tech dialogue platform								

Deliverable 3 – Policy dialogues on clean-tech entrepreneurship and innovation		X			X			X
Deliverable 4 – Barbados Clean Tech Policy Readiness Assessment and identified priority proposals				X			X	
Deliverable 5 – Barbados Clean Tech Quality Infrastructure Assessment and proposals for priority standards				X			X	

In addition, the contractor will be required to deliver the following:

- Item **High-resolution photographs (min. 3 MB, at least 20)** – that illustrate the undertaken activities. The consultants will cede all appertaining rights to unlimited use of the respective pictures to UNIDO and BLOOM/BIDC.
- Item **All used raw files and calculation sheets** in editable format (e.g., xls). All files need to be handed over and become property of BLOOM/BIDC and UNIDO.

4. Coordination and Reporting

English is the working language for this assignment. The contractor will report to the UNIDO Project Manager (Vienna) and the UNIDO Cluster Manager, located at the BLOOM/BIDC hub in Bridgetown, Barbados. The contractor will receive continued support and supervision by the BLOOM Cluster Team. In this context, team spirit is of high importance. Moreover, the contractor will closely coordinate with the assigned consulting team to develop the *Barbados Clean Tech Industry Report*. Moreover, the contractor will coordinate closely with other international partners (particularly UNDP, WB, IADB, IRENA). All draft and final deliverables are subject to prior approval by UNIDO and BLOOM/BIDC.

5. Qualification, evaluation and language criteria

Received technical bids need to comply with, and will be evaluated according to the following criteria:

MINIMUM ELIGIBILITY REQUIREMENTS		VALUE	SCORE
1	Immediate availability of the contractor; ability to implement the assignment despite the COVID-19 travel restrictions;	Yes	qualify
		No	does not qualify
2	Registered consulting company or institution with at least five (5) years of public and private consulting experience in the area of energy and the wider area of cleantech;	Yes	qualify
		No	does not qualify
3	Completeness of the technical and separate financial offer (e.g. CVs, track-record, legal and financial documents, all-in price);	Yes	qualify
		No	does not qualify
4	Full proficiency in English;	Yes	qualify
		No	does not qualify
5	The team leader obtains a relevant master's degree in engineering, economics or social science and demonstrates at least 7 years of consulting experience in the area of cleantech; the project team demonstrates a sound fusion of academic expertise and work experience in the area of cleantech.	convincing	qualify
		poor	does not qualify
6	Track-record and work experience of project team members in Barbados is a requirement. The employment of domestic expert(s) in line with local consultancy rates is a precondition;	Yes	qualify
		No	does not qualify

CRITERIA FOR THE QUALITY ASSESSMENT OF TECHNICAL OFFERS		VALUE	SCORE
7	Quality and coherence of the overall technical offer and efficiency of the proposed execution modality and team set-up;	convincing	20%
		regular	10%
		poor	0%
8	Quality of the proposed methodologies and tools to develop the clean-tech assessments and relevant proposal related to policies, regulations and standards;	good	20%
		regular	10%
		poor	0%
9	Quantity and quality of the provided track-record and work experience of the project team in the area of clean-tech (please provide examples of documents co-authored by team members);	good	20%
		regular	10%
		poor	0%
10	Quantity and quality of the provided track-record of written similar assessment reports, as well as clean tech policies, regulations and standards. The bidder shall include evidence on developed reports;	good	20%
		regular	10%
		poor	0%
11	Scope of work experience in the cleantech sector in Barbados.	good	20%
		regular	10%
		poor	0%
MAXIMUM SCORE			100%

In accordance with UNIDO procurement rules, the technically acceptable bid with the lowest (all-inclusive) price will be awarded. Only technical proposals with a quality score of 70%, or more, will qualify. UNIDO reserves the right to request additional information from bidders, if necessary.

6. Application Procedure

Interested and qualified bidders shall submit their written proposals in English:

- Technical Proposal (including proposed approach and methodology, work and activity plan, detailed CVs of experts, copies of university degrees, certifications, licenses as well as proven track record of implemented assignments);
- Separate Financial Proposal in USD including all costs and taxes (includes a detailed work-time-expert-diagram indicating daily rates for individual team members);
- Documents demonstrating the quality of the track-record of the project team with regard to industry reports, preferable in the cleantech sector.

Bidders are requested to submit their proposals no later than **22 March 2021, 17:00 hours, CET**, by registering on the UNIDO eProcurement Portal (<https://procurement.unido.org>). In case of technical difficulties, please contact UNIDO Help Desk at procurement@unido.org.

7. Further information

- GEF-UNIDO CEO Endorsement Document, <https://open.unido.org/projects/BB/projects/150123>
- <https://www.gn-sec.net/content/barbados-sustainable-energy-industry-market-assessment-report>
- <https://www.thegef.org/project/strategic-platform-promote-sustainable-energy-technology-innovation-industrial-development>
- <http://bloomcluster.com/>
- <https://www.gn-sec.net/content/bloom-regional-program>
- www.unido.org