

Formulation of the Bangsamoro Sustainable Energy Master Plan Philippines



Terms of Reference | Jan 18, 2024

This technical assistance will support the Bangsamoro Government in establishing its energy planning process by first formulating its Sustainable Energy Master Plan, highlighting how to effectively and strategically implement the judicious utilization of the Bangsamoro region's renewable energy resources. It will include developing strategies for integrating low-carbon pathways in alignment with the region's sustainable development goals and developing an energy investment plan framework. To ensure sustainability, there will be a strong focus on capacity-building activities and information transfer to the policymakers. Being a newly established autonomous region, the Bangsamoro Government requires enhanced technical capability and guidance on its energy planning process toward a low-carbon sustainable pathway. Supporting the transition of the Bangsamoro region strategically places energy transition as an integral part of its sustainable economic development which, in effect, contributes to the Philippines' overall renewable energy target and emissions reduction goal.

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I. Introduction

- 1 The Southeast Asia Energy Transition Partnership (ETP) brings together governments and philanthropies to work with partner countries in the region. ETP supports the transition towards modern energy systems that can simultaneously ensure economic growth, energy security, and environmental sustainability. To contribute to the achievement of the UN's Sustainable Development Goals (SDGs) and the Paris Climate Agreement objectives, ETP works in Southeast Asia, with a focus on three priority countries, namely Indonesia, the Philippines, and Vietnam. ETP's strategy is built around four interrelated pillars of strategic engagement that are squarely aligned to address the barriers to energy transition. These are (i) policy alignment with climate commitments, (ii) de-risking energy efficiency and renewable energy investments, (iii) extending smart, and (iv) expanding knowledge and awareness building.

II. Summary

- 2 The Southeast Asia Energy Transition Partnership (ETP) will support the Bangsamoro Government in formulating its low-carbon Sustainable Energy Master Plan. The Master plan will identify how the energy sector development of the Bangsamoro Autonomous Region in Muslim Mindanao (BARMM) proceeds through a low-carbon pathway through renewable (RE) utilization and energy-efficient power systems. In addition, related capacity building on energy planning shall be crafted for the Ministry of Environment, Natural Resources, and Energy (MENRE) and a Bangsamoro Sustainable Energy Summit will be organized. Currently, the Bangsamoro Government needs more technical capability and resources to develop and implement a low-carbon, RE-based sustainable energy system, and there need to be targets and an action plan to achieve these.
- 3 There is already an overarching institutional framework for MENRE to put forward a sustainable energy system, and these are the Bangsamoro Organic Law (BOL) and the Bangsamoro Development Plan (BDP) 2023-2028. The former promotes low carbon and sustainable power generation, while the latter identifies improving energy security through the exploration, development, and utilization of sustainable energy resources, and improving the investment climate for the energy sector.

III. Project Details

A. Rationale

- 4 The BARMM is a newly established government entity in the Philippines. It was formed as a result of the peace process negotiations between the Government of the Philippines and the Moro Islamic Liberation Front. The BARMM government has been granted greater fiscal and political autonomy, as stipulated in the Bangsamoro Organic Law. One of the agencies created as part of the BARMM government structure is the MENRE. Under MENRE, is the Energy Management and Development Services (EMDS), primarily responsible for the exploration,

utilization, management, conservation, protection, and sustainable development of the region's potential energy sources. Unlike the Philippines' government structure at the national level, which implements a presidential system of government, the Bangsamoro region implements a parliamentary system.

- 5 As a newly established government office, EMDS-MENRE has to first develop energy policies, regulations, and master plans. Through initial scoping and data collection, it was concluded that power sector development through a low-carbon and sustainable pathway should be prioritized to support the continued development of BARMM. The second Bangsamoro Development Plan (BDP 2023 - 2028) has set macroeconomic targets for the next six years in achieving growth in the gross regional domestic product, growth of the industry and services sectors, and reduced unemployment rate among others.
- 6 While the Bangsamoro Organic Law recognizes the importance of sustainable development of the region and the utilization of renewable energy for its power requirements, specific initiatives indicate otherwise such as the recently-released Circular on the joint award of petroleum service and coal operating contracts in BARMM.¹ With this policy, BARMM is given its due right to access indigenous and conventional energy resources for its economic development. However, this also provides an opportunity for BARMM to simultaneously plan for renewable energy projects and identify energy efficiency measures to achieve an optimal energy mix towards energy security, affordability, and reliability.
- 7 ETP has provided technical support to the EMDS-MENRE in its energy planning process by conducting a scoping of the Bangsamoro region's energy sector. The output is the Bangsamoro Power Sector Development Roadmap, which sets out the pathway for each of the key development areas identified - (1) Sufficient and reliable electric power industry; (2) Improved electrification level; (3) Potential energy sources and facilities explored, developed, and utilized; (4) Energy institutions established, improved, and harmonized; and (5) Partnerships established. Between 2023 and 2030, BARMM will formulate and start implementing energy master plans.
- 8 Continuing from the initial work supported by ETP and in response to the request from MENRE to further assist them in the development of their power sector, ETP is supporting BARMM in formulating its Sustainable Energy Master Plan. The work will also include implementing related activities such as organizing the first BARMM Sustainable Energy Summit and providing knowledge-raising activities.

B. Impact

- 9 The project's impact is for sustainable energy development embedded in policy-making and planning by the Bangsamoro government (BARMM) for a low-carbon development pathway.

¹ Philippine Information Agency. (6 July 2023). Joint award of petroleum, coal service deals to put BARMM as another energy resource hub in PH.

<https://pia.gov.ph/news/2023/07/06/joint-award-of-petroleum-coal-service-deals-to-put-barmm-as-another-energy-resource-hub-in-ph>

C. Objective, Outcomes, and Outputs

- 10 The overall objective of this project is to enable the sustainable low-carbon, RE-optimized energy development in the Bangsamoro Autonomous Region in Muslim Mindanao.
- 11 The expected outcomes of this technical assistance are as follows:
 - a. Sustainable energy planning in the Bangsamoro region established;
 - b. Increased investment opportunities in renewable energy projects in BARMM; and
 - c. Increased adoption of energy efficiency measures
- 12 The primary outputs of this project are
 - a. Bangsamoro Sustainable Energy Master Plan with a Policy Brief
 - b. BARMM Sustainable Energy Summit
 - c. Capacity building and knowledge-sharing events on sustainable energy planning and development for policymakers

D. Sustainability, Gender Equality, and Social Inclusion Mainstreaming

- 13 ETP is committed to promoting and supporting gender equality and social inclusion (GESI) through its project implementation. Groups that will be impacted by the project activities shall be identified through a contextual and gap analysis. The Project shall be inclusive of the invited stakeholders during the consultation and seek a balanced representation of women and other identified groups in project activities. The implementing partner should identify the implications, outputs, and contributions to gender equality and social inclusion in the energy planning process and the development of a sustainable energy master plan. This task shall be accomplished through a clear methodology and approach, which must be identified as part of the inception report.

IV. Project Deliverables

- 14 In line with the outputs and outcomes expected from this project (see Project Details), this section provides additional information on specific deliverables that will be required in order to accomplish the above project outputs.
- 15 Table 1 outlines the key deliverables that are expected in this project. Additional details on associated activities for each deliverable follow Table 1.

Table 1. Key deliverables

Payment	Deliverables	Target Delivery	Payment Allocation
1	Deliverable 1: Inception Report	Month 1	15%
2	Deliverable 2: Capacity Building Plan	Month 3	15%

Payment	Deliverables	Target Delivery	Payment Allocation
3	Deliverable 3: Capacity Building Workshop* on Power Planning and Post-Workshop Report (<i>Indicative Month 5</i>) Deliverable 4: Capacity Building Workshop* on Renewable Energy Project Development Cycle and Post-Workshop Report (<i>Indicative month 9</i>)	Month 5 and 9	10%
4	Deliverable 5: First writeshop* for the Draft BARMM Sustainable Energy Master Plan (Month 5) Deliverable 6: Site visit* to one Renewable Energy Project (<i>Indicative month 9</i>) Deliverable 7: Second writeshop* for the Finalization of the BARMM Sustainable Energy Master Plan (Month 11)	Month 5, 9, 11	15%
5	Deliverable 8: BARMM Sustainable Energy Master Plan with a Policy Brief	Month 12	25%
6	Deliverable 9: BARMM Energy Summit* and Post-Summit Report	Month 14	10%
7	Deliverable 10: Coordination and Technical Working Group Meetings*	Continuous throughout the project	10%
Monthly Progress Report: In addition to the listed deliverables, the consultant will need to provide monthly progress reports as per the provided template. Failure to submit this report will result in the payments being withheld.		Monthly	

Some of the above deliverables () contain logistic organizations of workshops/discussion groups and meetings. The consultant is required to provide, in addition to the personnel costs and the non-personnel costs to organize and execute all aspects of the workshops, including organization and logistics² for financial evaluation.

16 The project implementation framework is designed to be delivered through three components:

Component 1: Coordination and Technical Working Group

² See detailed minimum requirements on the logistic organizations in the section IV. Project Activities and Expected Deliverables.

- 17 With the overall goal of crafting a BARMM Sustainable Energy Master Plan that is consistent and aligned with the Bangsamoro Organic Law and Bangsamoro Development Plan, a multistakeholder technical working group (TWG) shall be created for a consultative approach to the process. Moreover, an important aspect of the project is to establish and maintain a coordination mechanism with the MENRE focal to provide advisory services on renewable energy, energy efficiency, and sustainability. Corresponding Inception and Final Completion reports shall be submitted as part of the project deliverables at the start and end, respectively.

Component 2: BARMM Sustainable Energy Master Plan

- 18 The Sustainable Energy Master Plan is considered as the main output of this technical assistance, with emphasis on energy demand and supply analysis, strategies for low-carbon development in the region as it progresses, an investment plan framework for energy infrastructure. A Policy Brief of the BARMM Sustainable Energy Master Plan shall be developed.

Component 3: Knowledge Management

- 19 The knowledge management component is embedded to ensure that project outputs become sustainable and usable by MENRE and that energy development in the BARMM progresses sustainably. To achieve this, a training needs assessment (TNA) shall be carried out and relevant capacity-building sessions (two sessions) will be conducted based on the results of the former. A BARMM Energy Summit, which is a first for the region, will be organized as part of this technical assistance. Lastly, two write shops to develop the BARMM Sustainable Energy Master Plan shall be organized.

Deliverable 1: Inception Report

- 20 The Consultant shall prepare the project inception report based on the agreed timeline of implementation and methodology and any other agreements made during the kick-off meeting/s. As a deliverable, the inception report ensures that project expectations are aligned with the understanding of the Consultant. It shall contain, as a minimum:
- a. Introduction and project background
 - b. Scope of Services
 - c. Methodology and Workplan, including approach, methodology, and project Gantt chart. The approach shall detail how each deliverable will be met and what each submission will contain including an Annotated Outline for the main deliverables
 - d. Stakeholder Analysis, which includes an audience mapping, analysis, and communication/ outreach plan
 - e. A donor coordination strategy, explaining how project outputs will leverage and complement ongoing and planned projects from other development partners
 - f. Project management inclusive of organizational chart detailing key personnel, their roles and responsibilities, as well as their locations (strong in-country team and project management is required), and project quality assurance
 - g. Risks, mitigations, and assumptions
 - h. Monitoring and Evaluation Framework, presented in the form of the ETP Results Based Monitoring Framework (RBMF)

- i. Communications Plan³, identifying the suitable media channels for communicating the project and the rationale for choosing them as described in Table 2.

Table 2. Minimum Requirements of the Communications Plan

Item	Communications materials	Quantity
1	Social media posts (liaising with ETP)	At least 6
2	Press releases, upon agreement with MENRE	1 per public workshop/ event
3	Online presentations of project progress and highlights to the ETP Secretariat and/or ETP Funders	1 (1 hour maximum)

Deliverable 2: Capacity Building Plan

- 21 The Consultant must first conduct a training needs assessment (TNA) before delivering the capacity-building to aid in the workshop design and modules development appropriate to MENRE and related BARM planning officials. Initial discussions with MENRE indicate that the capacity building for this technical assistance should focus on energy planning (demand and supply simulations) and renewable energy project development. The results of the TNA shall be documented in the Capacity Building Plan.

Deliverable 3: Capacity building workshop⁴ on Power Planning and Post Workshop Report

- 22 On energy planning, it is initially envisioned that this would focus on power planning simulation for power demand, supply, and outlook so that MENRE gains an understanding of and becomes familiarised with doing the necessary power planning simulations to be able to develop/ update the succeeding energy roadmaps and master plans. This includes determining different demand scenarios and their corresponding optimal power generation mix and greenhouse gas emissions. EMDS currently does not own or have a default energy planning tool. The Consultant should include in its proposal the tool that they intend to use, with preference for open access tools, and how this can be used by MENRE in future simulations.
- 23 The energy planning workshop must be held in a conducive environment in Davao City, with an expected audience of 15 participants. The Consultant should include the minimum 4-night accommodation and meals (breakfast, lunch, and dinner) for the government participants. For all capacity buildings held, a Workshop Report shall be submitted to ETP two weeks after its implementation.

³ The consultant is requested to deliver the communications activities as per the requirement in Table 2. The bidders should propose the non-personnel budget if there is for the execution of the communication work in their financial proposal.

⁴ All the capacity building workshop, writeshop, site visit and summit in the deliverables will have both personnel and non-personnel pricing components. The bidders must include in their financial proposal form the non-personnel costs associated with organizing relevant events including, venue, organization, and other travel and logistics expected, separately from the deliverable's personnel lumpsum costs required to deliver the deliverable.

Deliverable 4: Capacity building Workshop on Renewable Energy Project Development Cycle

- 24 On RE project development, the Consultant is expected to deliver renewable energy (RE) project development workshop on two RE technologies for MENRE and relevant BARMM planning officials. The focus will be on a RE technology deemed viable in the Bangsamoro region as a result of the Sustainable Energy Master Plan development i.e. solar and hydro or geothermal, and shall result in two similar reports resulting from the workshop exercises. The training agenda and modules will be crafted based on the TNA conducted earlier in the project. One site visit shall also be organized by the Consultant as part of the capacity building on the RE project development.
- 25 The Consultant should consider holding a four-day workshop (2 days for each RE technology) in a conducive environment either in Davao City or Zamboanga City, with an expected audience of 20 government participants, and laying out the RE report/s produced. The Consultant should include in their financial proposal a 5-night accommodation and meals (breakfast, lunch, dinner) for the government participants and other logistic costs that may be required to execute a workshop.
- 26 After the workshop is completed, a Workshop Report shall be submitted to ETP two weeks after its implementation as part of this deliverable.

Deliverable 5: First writeshop for the Draft BARMM Sustainable Energy Master Plan

- 27 The Consultant must organize at least two write shops in the development of the BARMM Sustainable Energy Master Plan to ensure ownership of the output. It should be held in a conducive environment in Davao City, and the expected number of participants in each writeshop is 15. The duration of each writeshop will be 2 full days. The Consultant should include the 3-night accommodation and meals (breakfast, lunch, dinner) of the 15 government participants. After each writeshop is completed, an Activity Report shall be submitted to ETP two weeks after its implementation.
- 28 The timeline for the writeshops will be determined during the implementation stage but the indicative timeline for the first one is in the 5th month.

Deliverable 6: A site visit to one Renewable Energy Project

- 29 On the site visit, the Consultant in coordination with MENRE, shall identify a successful RE project to visit in Palawan that utilizes a smart solar network. This should be related to the RE technology that will be discussed in the capacity-building workshop.
- 30 The Consultant should include in their financial proposal all logistics/travel costs, accommodation, and meals for the direct government counterparts for 8 pax, who are based in Cotabato city. The total nights at the site visit will be 3 nights to allow two full days of discussion.

Deliverable 7: Second writeshop for the Finalization of the BARMM Sustainable Energy Master Plan and a Post-Writeshop Report

- 31 The Consultant is required to organize a second writeshop (one full day) to finalize the BARMM Sustainable Energy Master Plan together with MENRE. It should be held in a conducive environment in Davao City, and the expected number of participants in each writeshop is 15. The Consultant should include the 2-night accommodation and meals (breakfast, lunch, dinner)

of the government participants. After the writeshop is completed, a Post-Writeshop Report shall be submitted to ETP two weeks after its implementation.

- 32 The timeline for the writeshops will be determined during the implementation stage but the indicative timeline for the second workshop is in the 11th month.

Deliverable 8: BARMM Sustainable Energy Master Plan with a Policy Brief

- 33 The Consultant shall work closely with MENRE in developing the BARMM Sustainable Energy Master Plan. At the beginning of 2023, ETP started engagement with MENRE to conduct a scoping assessment of the gaps and opportunities for energy transition in the Bangsamoro region. The result is a Power Sector Development Roadmap, which puts together the energy data, goals, objectives, and opportunities for the Bangsamoro region. The Roadmap also highlighted the need to institutionalize policy frameworks that will ensure the low-carbon, sustainable development of the energy sector in the region, specifically through the formulation and operationalization of roadmaps and master plans. Within this context, the Consultant is expected to assist MENRE in laying out the foundation for sustainable energy development in the region through the BARMM Sustainable Energy Master Plan
- 34 The key objective of the BARMM Sustainable Energy Master Plan document is to establish a time-bound plan of action for renewable energy and energy efficiency policies and programs in conjunction with the region's economic growth, social development, and environmental protection. It should provide discussions, at the minimum on power demand and supply assessment and outlook; low-carbon strategies vis-a-vis energy sector goals and objectives; energy sector development with the wider planning process of the region and other policy frameworks; an investment plan framework identifying potential financing options for energy infrastructure projects and implementation of the low-carbon strategies; and appropriate financing mechanisms i.e. public-private partnerships, official development assistance, or local finance. The Master Plan must be aligned with the relevant provisions of the Bangsamoro Organic Law (BOL), Bangsamoro Development Plan (BDP), and BARMM Power Sector Development Roadmap and shall contribute to the Philippines' national renewable and energy efficiency targets set in the Philippine Energy Plan. It shall leverage the low-carbon development pathway and sustainable development prescribed in the BOL. Similarly, the process shall be geared towards a clean and sustainable energy sector development to deliver reliable, secure, and affordable power to BARMM.
- 35 The Consultant is required to cover the following topics in the master plan. However, the Consultant/ bidders may propose a wider coverage to include other topics.
- a. Policy Brief
 - b. Energy Goals and Objectives
 - c. Energy Resources Assessment
 - d. Energy Demand Analysis
 - e. Energy Supply Mix
 - f. Infrastructure Development

- g. Energy Efficiency and Conservation
- h. Environmental and Social Considerations
- i. Regulatory and Governance Framework
- j. Integration with the broader BARMM and Mindanao planning processes
- k. Investment or financing framework

36 *A Policy Brief, which is the Master Plan's Executive Summary*, shall also be written as an integral part of the document. It should succinctly provide the context and key provisions of the Master Plan, and be able to present the benefits of renewable energy and energy efficiency measures to the Bangsamoro Region's economic growth, social development, and environmental protection. The main audience of the Policy Brief is members of the Parliament, which is the Bangsamoro's legislative body. The Policy Brief should not exceed five pages.

Deliverable 9: BARMM Energy Summit and Post-Summit Report

- 37 The Consultant shall also organize the first BARMM Energy Summit (one full day) to bring together energy stakeholders including government officials, energy executives, researchers, and energy experts to discuss and address the most urgent energy transition challenges and opportunities in the region.
- 38 The Consultant shall work closely with MENRE and ETP to define the theme of the first BARMM Energy Summit and details such as venue, date, participants, and speakers/ presenters.
- 39 In designing the proposal, the Consultant should consider an appropriate venue either in Zamboanga City or Davao City, with an estimated 100 participants. While the exact location is yet to be confirmed during the project's implementation, the bidder is requested to provide a financial proposal for organizing the Summit as if it were confirmed to be in Davao City, with accommodation and meals (breakfast, lunch, and dinner) for direct government beneficiaries for 20 pax calculated in the non-personnel portion of their financial proposal.
- 40 *A Post-Summit Report* shall be prepared and submitted by the Consultant to ETP two weeks after its implementation.
- 41 In all of the capacity building workshops and events, the Consultant is expected to:
- a. handle all tasks related to the workshop including organizing the logistics, inviting participants and speakers, booking the venue, and executing the actual workshop
 - b. shall be mindful of gender sensitivities and social inclusivity
 - c. submit a Post-Summit Report two weeks after the event with the following details:
 - i. Description of the workshop (e.g., background, objective, organization)
 - ii. Workshop agenda
 - iii. List of participants with gender-disaggregated data

- iv. Workshop proceedings (e.g., summary of presentations, key points raised, important insights, significant outcomes or decisions)
- v. Gender considerations and social inclusion
- vi. Conclusion and next steps
- vii. Annexes (supporting materials such as slides of the presentations, workshop handouts, participant list, list of comments, etc.)

Deliverable 10: Coordination and Six Technical Working Groups (TWG)

- 42 The Consultant shall work closely with MENRE throughout the Project and provide guidance on sustainable energy planning and support the development of the Bangsamoro region within the context of its economic, social, and environmental development. Moreover, the Consultant must be adept at providing advisory services to MENRE in terms of sustainable development, energy planning, policy development, renewable energy, and energy efficiency.
- 43 The coordination of the project activities includes the provision of a Technical Advisor, who will be available to provide ad hoc advisory and guidance to MENRE on the subjects of energy planning, climate change, and sustainable development. The Technical Advisor should be available to respond to questions or clarifications that will be raised by MENRE. The Technical Advisor should also be able to initiate discussion and provide insights, best practices, and developments on clean energy planning that may be applicable in BARMM to increase appreciation of MENRE on renewable energy and energy efficiency. The estimated number of support days by the Technical Advisor is 70 person-days spread over 14 months.
- 44 The Consultant will assist MENRE in establishing and convening the project TWG and act as its Secretariat. The TWG members shall be identified and agreed with MENRE, but the Consultant could recommend members whose roles will be beneficial to the low carbon, sustainable energy development in BARMM. As the TWG Secretariat, the Consultant is responsible for the arrangement of meetings, documenting minutes, and coordinating with the TWG members. The Consultants will also collate and maintain all relevant documents, presentations, and other materials resulting from the TWG meetings. Ownership of all official documents must be transferred to MENRE at the end of the technical assistance.
- 45 The Consultant is required to plan and organize at least six TWG meetings (half-day events) for a minimum of 35 participants each. The timeline for the TWG meetings is spread across a 14-month period, where the schedule is to be finalized with MENRE.
- 46 The minimum 6 TWGs comprises of two types of meetings:
 - a. Three TWGs in Davao City for the first, mid, and final TWG convening
 - i. The first, mid, and final TWGs will be held in Davao City. The duration of the TWG is half a day with a coffee break provided.
 - ii. The consultant is required to provide the financial proposal to cover all logistic costs to organize the TWGs, except for the participants' transportation costs which will be absorbed by the government beneficiaries. The logistic costs include the 2-night accommodation for the 35 participants; one for the night

before the TWG and the other for the night on the TWG day, due to security reasons.

b. Three other TWG meetings in between

- i. These TWGs should be in a conference room of MENRE or any other BARMM government office within the BARMM Compound in Cotabato City to establish BARMM ownership of the process. No venue costs are expected, except for the meeting refreshments.

47 This setup ensures the attendance of the nominated TWG members and keeps their momentum.

Monthly Progress Report

48 In addition to the listed deliverables, the consultant will need to provide **monthly** progress reports (concise narrative of activities completed with next steps) as per the **provided template with updates on the mentoring activities, if applicable**. Failure to submit this report will result in the payments being withheld.

49 The monthly progress report serves as the mentoring report and is an internal facing between the consultant and the ETP team. The monthly progress report must also include the following standard items:

- a. Updated Gantt Chart
- b. Risks and mitigations
- c. Minutes of meetings, where applicable
- d. Minutes of Interviews, Consultations, Workshops, FGDs, etc., where applicable
- e. On a quarterly basis, this report should include an update on results achieved as per the Results Based Monitoring Framework (RBMF) and provided template. Where applicable, must be gender disaggregated

50 The final monthly progress report will include the above items and the following:

- a. Summary of lessons learned from the project
- b. Recommendations on the project's next steps

Other key information:

- A public-facing, publishable Executive Summary (approximately 2 pages) in professional English must be submitted with each deliverable, except for the BARMM Sustainable Energy Master Plan where it will be in the form of a Policy Brief.
- A public-facing, PowerPoint presentation highlighting key information must be submitted with each deliverable.
- All project deliverables and presentations must be submitted in English.
- All deliverables are subject to review by ETP, and beneficiary entity(ies) where applicable, before approval. If there are comments and suggestions, the deliverables need to be revised accordingly before payment is released.

- The Consultant is required to update the results and achievements of the project per the agreed project-level Results-Based Monitoring Framework (RBMF), as per the approved template. All results, where applicable, must be gender disaggregated.
- The Consultant is required to organize and execute all aspects of knowledge management events, including organization and logistics.
- The Consultant shall consider and highlight specific gender considerations in their proposal.
- The Consultant must be available to attend one (1) in-person workshop with the ETP secretariat in the region. The costs for this will be covered outside the financial scope of this proposal.
- The Consultant, or an active organization within the applying consortium, shall have an in-country, local partner fully operating in the Philippines through the project timeline.

V. Project Timeline

- 51 The project will require 14 months. The actual project timeline will be presented by the consultant and agreed upon in the Inception Report.

Table 3. Proposed timeline of project implementation

Activity	Month													
	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Coordination activities														
Establishment and convening of the technical working group (TWG)														
Develop the Capacity Building Plan														
Develop the BARMM Sustainable Energy Master Plan with Policy Brief														
<i>Determine the power supply and demand of BARMM</i>														
Capacity building workshop on power planning														
Writesops														
Capacity building workshop on RE Project Development Cycle														
Site visit to an RE community														
Conduct Energy Summit														

VI. Key Beneficiaries

- 52 The key beneficiaries of this project are provided in Table 4.

Table 4. List of beneficiaries of this project

Beneficiary	Benefit	Explanation
Ministry of Environment, Natural Resources, and Energy	Direct	MENRE is the Bangsamoro region's lead agency in the regulation of its energy sector through its Energy Management and Development Services.
Bangsamoro Planning and Development Authority	Indirect	BPDA is the Bangsamoro region's lead agency in reconciling the plans and programs of BARMM ministries, ensuring that these are aligned with the macroeconomic goals of the region. MENRE works with BPDA on externally-supported projects such as ETP.
Bangsamoro Transition Authority	Indirect	BTA is BARMM's Parliament, mainly responsible as the Bangsamoro's legislative body. Related issuances for BARMM will be subject to BTA's review and approval.

- 53 A donor mapping was conducted to prevent duplication of efforts between ETP and other development partners in the same areas, as well as to identify areas where ETP could provide support for energy transition that had not yet been addressed. See below

VII. Donor Mapping

Table 5. List of Donor Mapping

Name of Organization	Topic and Detailed Activity
UNOP's Support to Bangsamoro Transition (SUBATRA)	<p><i>SUBATRA contributes to a smooth and timely undertaking of the transition through capacity building of the three branches of the Bangsamoro Government (executive, legislative and judicial) and civil society organisations. Outputs include:</i></p> <ul style="list-style-type: none"> Enhanced capacity of the Bangsamoro Transition Authority's Executive Branch to efficiently formulate and implement transition policies Enhanced capacity of the Bangsamoro Parliament to exercise its law-making, oversight, and representation functions Enhanced capacity of the multifaceted Bangsamoro justice system to adjudicate litigation Enhanced capacity of the civil society to contribute to a peaceful transition to BARMM
UNIDO's Renewable energy technology for seaweed value added in Tawi-Tawi (RETS)	<p><i>Aimed at assisting the government in its electrification targets, particularly in the underserved areas of the country by providing electricity access for seaweed processing in Tawi-tawi. Outputs include:</i></p> <ul style="list-style-type: none"> Hybrid RE facilities for seaweed processing Capacity building activities

- 54 The Consultant is expected to identify and engage with other relevant stakeholders as part of this project.

VIII. Results-Based Monitoring Framework

A. Results-Based Monitoring Framework

55 The Results of the Project are monitored through the following Framework in Table 5. All reports will update the achievement of the indicators.

Table 6. Results Based Monitoring Framework Outline

INDICATORS	TARGETS
IN 1.1-02 - National energy plans reflect an ambition towards increasing the share of RE/VRE, improving EE, and phasing-out fossil fuels	1 Bangsamoro Sustainable Energy Master Plan with a Policy Brief
IN 2.2-01 - No. of new and existing, national and international, financing options/instruments de-risked and opened for private and blended financing	At least two reports on RE Project Development for investors in BARMM
IN 1.3-01 - Presence of an effective National-level agency/institution	1 entity strengthened in sustainable energy planning (EMDS-MENRE)
IN 1.3-02 - Improved dialogue among government ministries and departments for a coordinated response o energy transition	1 technical working group
IN 4.1-02 - No. of trainings, knowledge-sharing events, and/or awareness workshops organised at national and regional levels building institutional capacity and knowledge networks	<ul style="list-style-type: none"> At least one Low Carbon Sustainable Energy Summit At least three capacity-building workshops for EMDS-MENRE 1 site visit to a RE-based community in the Philippines, replicable in BARMM

56 The results are reported with additional supporting information and evidence where applicable and necessary.

IX. Qualification and experience of the service provider and evaluation criteria

A. Qualification and Experience of the Service Provider

- B. The consultant's project team should demonstrate the capacity to execute the work and should include all essential roles filled with personnel with relevant experience. CV's of the personnel proposed should be used to verify this information.
- C. The following are the **minimum positions** that should be included on the team. Bidders should make an assessment of the additional positions needed (if any) to complete the assignment as per Terms of Reference:

- a. 1 Team Lead
- b. 1 Technical Advisor
- c. 1 Modeling Expert/ Power Analyst
- d. 1 Clean Energy Specialist
- e. 1 Energy Policy Expert
- f. 1 Finance Expert
- g. 1 Economist
- h. 1 Stakeholder Engagement Specialist
- i. 1 Gender Equality and Social Inclusion Specialist

- D. Considering the importance of close coordination with stakeholders in the [PHILIPPINES](#), it is expected that the team proposed consists of consultant(s) who understand the local context in the [PHILIPPINES](#).
- E. The bidder should also assign a Contract Manager who would liaise on the non-technical part of the contract implementation, including coordination, liaising with key counterparts, liaising with UNOPS on the submission of invoice and payment-related documents.

F. Evaluation Criteria

Eligibility and Formal Criteria

- G. The criteria contained in the table below will be evaluated on **Pass/Fail** basis and checked during Preliminary Examination of the proposals.

Criteria	Documents to establish compliance with the criteria
1. Offeror is eligible as defined in Instructions to Offerors, Article 4. In case of JV, all JV members should fulfill this requirement	<ul style="list-style-type: none"> Form A: Joint Venture Partner Information Form, all documents as required in the Form, in the event that the Proposal is submitted by a Joint Venture. Form B: Proposal Submission Form
2. Completeness of the Proposal. All required Questionnaires (if any), Returnable Bidding Forms, and other documentation requested under the Document Checklist section have been provided and are complete	<ul style="list-style-type: none"> All documentation as requested under Instructions to Offerors Article 10, Documents Comprising the Proposals

Criteria	Documents to establish compliance with the criteria
3. Offeror accepts UNOPS General Conditions of Contract as specified in Section IV: Contract Forms	<ul style="list-style-type: none"> Form B: Proposal Submission Form

Qualification Criteria

H. The criteria contained in the table below will be evaluated on a Pass/Fail basis and checked during Qualification Evaluation of the proposals.

Criteria	Documents to establish compliance with the criteria
<p>1. The company should have a minimum of 3 years of continuous experience in delivering similar projects in the past with a track record of success.</p> <p>In the case of JV, at least one of the JV members should fulfill this criteria</p>	<ul style="list-style-type: none"> Certification of incorporation of the Offeror Form F: Performance Statement Form
<p>2. Offeror must provide a minimum of two (2) customer references from which similar services have been successfully provided, within any of the last 3 years.</p> <p>In the case of JV, the customer references of JV members can be combined</p>	<ul style="list-style-type: none"> Form F: Performance Statement Form

Technical Criteria

- I. Technical evaluation will be carried out to bids that pass the eligibility, formal, and the qualification criteria, with requirements as follows:
 - a. The maximum number of points that a bidder may obtain for the Technical proposal is 80. To be technically compliant, Bidders must obtain a minimum of 56 points
 - b. Minimum pass score: 70% of maximum 80 points = 56 points
- J. Technical proposal points allocation

Section number/description		Points Obtainable
1.	Offeror's qualification, capacity, and expertise	20
2.	Proposed Methodology, Approach, and Implementation Plan	32
3.	Key Personnel Proposed and Sustainability Criteria	28
Total Technical Proposal Points		80

Section 1: Offeror's qualification, capacity, and expertise

Section 1: Offeror's qualification, capacity, and expertise		Points	Sub-points
1.1	Brief description of the organization, including the year and country of incorporation, and types of activities undertaken, including the relevance of specialized knowledge and experience on similar engagements done in the past.	15	
	Bidders partnering up with a local entity to provide for the strategic consultations and communications expertise is required.		
	1. Experience in projects of comparable size, type, complexity, and technical specialty		5
	2. Experience in providing similar services in the region, especially in BARMM/ ARMM		5
	3. Understanding of BARMM local context, and partnering up with a Philippines-based entity to provide for the strategic consultation and, translations; as well as the communications expertise		5
1.2	General organizational capability which is likely to affect implementation: management structure, and project management controls. (Max 4 pages written text)	5	
	1. Management structure, management controls, and extent to which any part would be subcontracted		3
	2. Financial Capacity/financial stability: Bidder should have a minimum annual turnover of 300,000 USD in any of the past 2 years.		1

Section 1: Offeror's qualification, capacity, and expertise		Points	Sub-points
	In case of a joint venture, annual turnover is calculated based on the total annual turnover of the JV members.		
	3. Bidder should have liquidity /quick ratio should be minimum 1, in any of the past 2 years. In case of a joint venture, at least one of the JV members should have 1 liquidity/quick ratio in any of the past 2 years.		1
Total points for section		20	

Section 2: Proposed Methodology, Approach and Implementation Plan

Section 2: Proposed Methodology, Approach and Implementation Plan		Points	Sub-points
2.1	Description of the Offeror's approach including risk(s) and mitigation measure(s), and methodology for meeting or exceeding the requirements of the Terms of Reference	17	
	1. Description of the offeror's approach to identification of data sources, scenarios, issues for the deep-dive in the analysis and providing guidance to the government policymakers		3
	2. Description of the Offeror's approach to formulating the Bangsamoro Sustainable Energy Master Plan		6
	3. Description of the offeror's approach to developing and delivering the capacity building activities		6
	4. Description of the Offeror's approach to designing and holding the BARMM Energy Summit		2
2.2	Quality Assurance Plan	10	
	1. A plan outlining how the bidder intends to ensure oversight and quality assurance throughout the assignment. Quality Assurance plan should include a discussion on risk assessment and its mitigation plan		10

Section 2: Proposed Methodology, Approach and Implementation Plan		Points	Sub-points
2.3	Implementation Timeline	5	
	1. Bidder submits a detailed implementation timeline which includes detailed activities to be undertaken during this assignment, and is completed with Gantt chart		5
Total points for section		32	

Section 3: Key personnel proposed and Sustainability Criteria

Section 3: Key personnel proposed and Sustainability Criteria		Points	sub-points
3.1	Qualifications of key personnel proposed aligned with the Terms of Reference	27	
	<p><u>Team Lead</u></p> <p>Education:</p> <ul style="list-style-type: none"> A Master's Degree in Management, Engineering, Energy, Economics, Development, or related fields is required. A Bachelor's Degree with a minimum of 2 years additional experience in related fields is considered as an equivalent. <p>Experience:</p> <ul style="list-style-type: none"> A minimum of 5 years experience in leading teams to deliver projects in the energy sector is required Significant professional experience in project management of similar scale and/ or scope is required Understanding of power sector structures is desired Experience working in the Philippines' energy sector is desired such as previous successful involvement with national level agencies such as the Department of Energy and with local-level Government offices Previous successful engagement with ARMM and/ or BARMM is desired Computer literacy in Google Suites and/or Microsoft packages (MS Word, MS Excel, MS Access, MS PowerPoint) is required Language proficiency in English is required 		4
	<p><u>Technical Advisor</u></p> <p>Education:</p>		3

Section 3: Key personnel proposed and Sustainability Criteria		Points	sub-points
	<ul style="list-style-type: none"> A Master's Degree in Management, Engineering, Energy, Economics, Development, or related fields is required. A Bachelor's Degree with a minimum of 2 years of additional experience in related fields is considered as an equivalent. <p>Experience:</p> <ul style="list-style-type: none"> A minimum of 5 years experience in the development sector is required Previous experience in implementing clean energy projects in the Philippines, which demonstrates understanding of the Philippines' power structure, including generation, transmission, distribution, supply, and market mechanisms is required Experience in managing capacity-building sessions and stakeholder engagement activities is required Previous successful involvement with national level and/or local level government offices is desired Successful engagement with ARMM and/ or BARMM is desired 		
	<p><u>Modelling Expert/ Power Analyst</u></p> <p>Education: Bachelor's degree in Engineering / Energy / Environment / relevant subject plus 5 years of experience in power systems.</p> <p>Experience:</p> <ul style="list-style-type: none"> A minimum of 5 years experience in working in the power sector is required Previous experience in conducting power modeling and analysis is required Previous experience in successfully delivering power-related capacity building workshops is desired Understanding of power structures including generation, transmission, distribution, supply, and market mechanisms are required; experience in the Philippine context is desired Previous experience working in the Philippines energy sector with previous successful involvement with national level and/or local level government offices is desired. 		3
	<p><u>Clean Energy Specialist</u></p> <p>Education: Bachelor's degree in Engineering / Energy / Environment / relevant subject plus 5 years of experience in clean energy</p>		3

Section 3: Key personnel proposed and Sustainability Criteria		Points	sub-points
	<p>systems and/or renewable energy and project development.</p> <p>Experience:</p> <ul style="list-style-type: none"> • A minimum of 5 years work experience in clean energy systems and renewable energy technologies is required • Successful experience renewable energy project development is required • Previous experience in successfully delivering RE-related capacity-building workshops is preferred • Understanding of the Philippines' power sector is desired • Previous experience working in the Philippines energy sector with previous successful involvement with national level and/or local level government offices is desired • Successful engagement with ARMM and/ or BARMM is desired 		
	<p><u>Energy Policy Expert</u></p> <p>Education:</p> <ul style="list-style-type: none"> • Master's degree in Engineering/ Political Science/ Economics/ Development Studies or relevant subject. • A Bachelor's Degree with a minimum of 2 years of additional experience in related fields is considered as equivalent. <p>Experience:</p> <ul style="list-style-type: none"> • A minimum of 5 years experience working in the Philippines energy sector is required • A minimum of 5 years experience in policy analysis and development is required • Understanding of the Philippines' power structure, including generation, transmission, distribution, supply, and market mechanisms are preferred • Previous experience working in the Philippines energy sector with previous successful involvement with national level and/or local level government offices is desired • Successful engagement with ARMM and/ or BARMM is desired 		3
	<p><u>Finance Expert</u></p> <p>Education:</p> <ul style="list-style-type: none"> • Master's degree in Finance / Business / Economics / Engineering / relevant subjects 		3

Section 3: Key personnel proposed and Sustainability Criteria		Points	sub-points
	<ul style="list-style-type: none"> A Bachelor's Degree with a minimum of 2 years of additional experience in related fields is considered as equivalent. <p>Experience:</p> <ul style="list-style-type: none"> A minimum of 5 years experience in finance required Successful involvement in investment financing, specifically for the public sector is required Knowledge of the Philippines' energy sector and energy project development is desired Successful engagement with ARMM and/ or BARMM is desired 		
	<p><u>Economist</u></p> <p>Education:</p> <ul style="list-style-type: none"> Master's degree in Economics / Business / Finance/ Engineering / relevant subjects A Bachelor's Degree with a minimum of 2 years of additional experience in related fields is considered as equivalent. <p>Experience:</p> <ul style="list-style-type: none"> A minimum of 5 years experience in economics is required Successful involvement with projects on policy planning and project development is preferred Knowledge of the Philippines' energy sector and energy project development is desired Successful engagement with ARMM and/ or BARMM is desired 		3
	<p><u>Stakeholder Engagement Specialist</u></p> <p>Education:</p> <ul style="list-style-type: none"> Master's degree in Social Science / Communication / Environment / Climate Change / relevant subjects. A Bachelor's Degree with a minimum of 2 years of additional experience in related fields is considered as equivalent. <p>Experience:</p> <ul style="list-style-type: none"> A minimum of 3 years experience in stakeholder engagement activities is required Experience in managing capacity-building sessions and stakeholder engagement activities is required Knowledge of the Philippines' energy sector is desired Successful engagement with ARMM and/ or BARMM is desired 		3
	<p><u>Gender Equality and Social Inclusion Specialist</u></p>		2

Section 3: Key personnel proposed and Sustainability Criteria		Points	sub-points
	<p>Qualification:</p> <ul style="list-style-type: none"> • Bachelor's degree in international development, gender studies, sociology, or other related field required. • Master's degree is desirable. <p>Experience:</p> <ul style="list-style-type: none"> • A minimum of 5 years of progressive experience managing and providing technical support on gender and social inclusion initiatives in the Philippines or Bangsamoro region. • Familiarity with the socio-cultural context of BARMM is highly desirable. • Cultural sensitivity and awareness of gender dynamics within the local context, with an ability to navigate and address cultural nuances in project implementation. • Proficiency in conducting GESI impact assessments and applying gender-responsive frameworks. • Ability to gather and analyze data related to social inclusion and gender dynamics for informed decision-making. • Strong commitment to sustainable development principles, with an understanding of the interlinkages between gender equality, social inclusion, and environmental sustainability. • Strong interpersonal and communication skills. 		
3.2	The bidder shall provide a response that demonstrates its commitment to support gender equality through its operations and project implementation activities.	1	
Total points for section		28	

Financial Criteria (20 maximum points)

K. The financial part of those proposals that are found to be technically compliant will be evaluated as follows.

The maximum number of points that a bidder may obtain for the Financial Proposal is 20. The maximum number of points will be allocated to the lowest evaluated price bid. All other prices will receive points in reverse proportion according to the following formula:

Points for the Financial Proposal of a bid being evaluated =

$$\frac{[\text{Maximum number of points for the Financial Proposal}] \times [\text{Lowest price}]}{[\text{Price of the proposal being evaluated}]}$$

Financial proposals will be evaluated following the completion of the technical evaluation. The bidder with the lowest evaluated cost will be awarded (20) points. Financial proposals from other bidders will receive prorated points based on the relationship of the bidder's prices to that of the lowest evaluated cost.

Formula for computing points: Example

Points = (A/B) Financial Points
Bidder A's price is the lowest at \$20.00. Bidder A receives 20 points
Bidder B's price is \$40.00. Bidder B receives (\$20.00/\$40.00) X 20 points = 10 points

L. The total score obtained in both Technical and Financial proposals will be the final score for the proposal, with 80% allocated to the Technical proposal and 20% to the Financial proposal. The proposal obtaining the overall highest score will be considered as the winning proposal. This proposal will be considered to be the most responsive to the needs of UNOPS in terms of value for money.

The selection of the preferred bidder will be based on a cumulative analysis, analysing all relevant costs, risks and benefits of each proposal throughout the whole life cycle of the services and in the context of the project as a whole. The lowest priced proposal will not necessarily be accepted.