

Terms of Reference

1 February 2021

Provision of Services related to the development of the Barbados Clean Tech Industry Report and Tracking Framework

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 Terms of Reference

To boost a common marketing and identity of the industry, BLOOM intends to develop the Barbados Clean Tech Industry Report, which will be updated regularly. Attached to the report, it also intends to create a joint vision statement and label for the Barbados Clean Tech Industry (the BLOOM label). This will offer to the cluster members and Barbadian institutions an opportunity to promote their products and services under one label. The industry report will become part of a country report series under the BLOOM Regional Clean Tech Cluster Program, coordinated by UNIDO. It will also provide relevant data for the intended Barbados Green Industry

Assessment Reports of the Partnership for Action on Green Economy (PAGE). Moreover, the industry report will provide a more solid benchmark for the higher-level indicators in the GEF CEO Endorsement Document and its monitoring plan.

The initially developed Sustainable Energy Industry Baseline Assessment presents an initial basis, which will be further complemented and extended to other cleantech areas. Clean-tech includes a broad range of energy and environmental products and services (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).

To facilitate the process, UNIDO and BLOOM are seeking support from experienced contractors. Specifically, the contractor will provide the following deliverables (fully edited, designed and ready to be published):

- 1.) Clean Tech Industry Assessment and Database, incl. tracking framework
- 2.) Clean Tech Industry Report, incl. summary document for policy makers and clients
- 3.) BLOOM Clean Vision Statement and Label (incl. corporate identity design)

3. Scope of work, time and payment schedule

TASKS	DELIVERABLES	EXPECTED WORKING DAYS/Units	PAYMENT SCHEDULE
1. <i>Inception report (IP) and literature review (in English)</i>	Inception report to be approved by UNIDO, BLOOM/BIDC, MIBI, after consultation with the local and international stakeholders (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). Moreover, the contractor will undertake a review of existing literature and data. The contractor is responsible to collect relevant literature and studies. The contractor will be supported by the BLOOM Cluster team.	10 w/d	10% upon approved IP report
2. <i>Development of the Barbados Clean Tech Tracking Framework and Assessment (in English)</i>	The contractor will develop the Barbados Clean Tech Tracking Framework and Assessment (incl. database). The indicator framework will be prepared in line with international best practices (e.g., clean tech innovation index). Existing data and information will be complemented as much as possible. The assignment will require the development and implementation of industry surveys in cooperation with BLOOM and national chambers and associations. The surveys will require continued follow-up and interviews with key stakeholders of the clean-tech industry. The missing data and information will be completed as much as possible. Based on a well-established methodology, a tracking framework with key indicators of the cleantech industry will be developed. The tracking framework will become property of BLOOM/BIDC and UNIDO, and will be used for future updates. <u>The assessment/tracking framework and database will be provided to BLOOM by the contractor fully edited, designed (incl. graphs).</u> It will avoid repeating information of existing reports and studies.	20 w/d	20% upon approval of work
3. <i>Development of the Clean Tech Industry report, incl. summary document for</i>	Based on the previous analysis, the Barbados Clean Tech Industry report will be developed (max. 50 A4 pages in English, excl. annexes) in line with the assessment results. The report will be written and designed in an appealing and marketable way (incl. infographic design).	40 w/d	

<i>policy makers and clients (in English)</i>	It is directed towards potential industry and public clients and will also serve as a knowledge product of the industry itself. Moreover, it will allow continued monitoring of the clean tech industry evaluation and also the indicators in the GEF CEO Endorsement Document. The report will be designed in line with the Barbados Clean Tech Vision Statement and Label, to be developed under the activity below. <u>The report and the summary document will be provided by the contractor fully edited, designed (incl. graphs) and ready to be published in English.</u>		
4. <i>Development of the Barbados Clean Tech Vision Statement and Label</i>	The current BLOOM Barbados Clean Tech Vision Statement and Label will be reviewed and updated as required. Both shall represent the national vision of Barbados regarding clean-tech and will be mainstreamed in future marketing efforts of BLOOM and relevant trade organizations. The vision statement and label will allow the industry to promote products and services under one common national quality label. This will be also combined with the eco-tourism marketing efforts of the island. The vision statement and label will be validated during a workshop, bringing together public-private key stakeholders of the clean tech industry. The workshop be organized by BLOOM. Based on the agreed results, the contractor will finalize the corporate design and vision statement of the industry (incl. logo, templates for brochures, presentations, reports). <u>The work will be provided by the contractor fully edited, designed (incl. graphs) and ready to be published.</u> The corporate design will be provided in English, Spanish and Portuguese. All files will be provided in editable high-quality format (e.g., vector graphics) and will become the property of BLOOM/BIDC and UNIDO.	10 w/d	40% upon approval of the report, vision statement and label
5. Participate in various stakeholder consultations and meetings	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. Additionally, participation of international experts will be organized by skype/zoom, if required.	10 w/d	
6. Translation of the assessment framework tracking framework, industry report and corporate design in Spanish and Portuguese	The contractor will translate the assessment tracking framework, the industry report and corporate design in Spanish and Portuguese. All products will be provided by the <u>contractor fully edited, designed (incl. graphs) and ready to be published.</u>	10 w/d	30% upon submission of final reports
TOTAL		100 w/d (int. and local experts)	

The activities under this contract shall be completed within a period of five (5) months from the effectiveness of the contract. Additionally, due to the COVID-19 travel restrictions, it is essential that the contractor employ 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
Deliverable 1 – Inception report					
Deliverable 2 – Clean Tech Industry Assessment and Database, incl. tracking framework					
Deliverable 3 – Clean Tech Industry Report, incl. summary document for policy makers and clients					
Deliverable 4 – Updated Clean Tech Vision Statement and Label					
Deliverable 5 – Meeting documentation (e.g., minutes, lists of participants)					
Deliverable 5 – Translations					

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 the Government of Sao Tome and Principe.
- 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 hub in Bridgetown, Barbados. Moreover, the contractor will coordinate closely with other international partners (particularly UNDP, WB, IADB). All drafts and final deliverables are subject to prior approval by UNIDO and BLOOM/BIDC.

6. 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 seven (5) years of public and private consulting experience in the area of energy and the wider are 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 ore 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 assessment framework and database, as well as the industry report framework.	good	20%
		regular	10%
		poor	0%
9		good	20%

	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);	regular	10%
		poor	0%
10	Quantity and quality of the provided track-record of written similar industry reports. 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.

5. 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); offers without all-in price will be rejected;
- Documents demonstrating the quality of the track-record of the project team with regard to industry reports, preferable in the cleantech sector.

6. 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