

## **TERMS OF REFERENCE**

### **CONSULTANCY**

#### **TECHNICAL CAPACITY BUILDING TO SUPPORT THE GREEN TRANSITION IN CARIFORUM MSMES**

##### **1. BACKGROUND INFORMATION/RATIONALE**

###### **1.1 Relevant background**

Caribbean Export is implementing the European Union's Global Gateway Third Regional Private Sector Development Programme (RPSDP). The overall objective of the RPSDP is to increase employment creation, inclusiveness, and overall poverty reduction in the 14 member countries of the Caribbean Community and Dominican Republic, also known as CARIFORUM. Through targeted interventions that provide new and innovative frameworks for growth and development, the Agency is focusing on three areas.

1. Accelerating towards a Green Economy and a Digital Transformation
2. Access to Finance for regional SMEs
3. Expanding Trade and Investment under the European Economic Partnership Agreement

Within the context of the RPSDP, Caribbean Export has identified energy costs to be a significant variable impacting the operational expenses and therefore the international competitiveness of CARIFORUM firms. CARIFORUM countries have amongst the highest costs of electricity globally. According to World Bank data over the period 2015-2020, the average price of electricity in CARIFORUM was USD 0.27/kWh compared to the OECD average of USD 0.15/kWh and the global average of USD 0.17/kWh. Furthermore, this premium significantly increases within the Organisation of Eastern Caribbean States (OECS) who have paid on average USD 0.35/kWh over the same period. These high costs reflect the structure and operation of the electricity system in CARIFORUM countries, which in turn has significantly contributed to exchange reserve pressure, fiscal deficits and public debt with serious implications for energy security, energy affordability and the competitiveness of the CARIFORUM private sector.

Climate change mitigation and adaptation present an opportunity for economic transformation as the cross-sectoral impact of the energy transition would: (i) limit the region's exposure to energy dependency and by extension energy price shocks, (ii) create fiscal space and lessen the burden on countries' foreign exchange reserves and (iii) provide new and more flexible clean energy and other environmental services to commercial and industrial consumers. Furthermore, the integration of international standards, including voluntary sustainability standards (VSS) will impact the region's private sector's ability to trade competitively.

To deal with the pressures associated with climate change and the severe risks it poses to the region, the private sector must play a key role in transitioning to sustainable economies. Therefore, the strategic focus of this action on the green economy transition through private sector development will contribute to the region's ability to leverage emerging green technologies to facilitate far reaching economic transformation. In fact, the International Renewable Energy Agency estimates that for every US dollar invested in energy transition, an additional US 93 cents of GDP growth will occur above the business-as-usual scenario.

The programme is geared towards increasing the awareness and capacity of regional SMEs to implement green business practices such as international and voluntary sustainability standards, circular production and other such practices thereby contributing significantly to their international competitiveness.

In line with its strategic initiatives under the RPSDP, Caribbean Export has been actively supporting businesses in the region to embrace the green economy transition via the International Trade Centre's "Green to Compete Hub" initiative. Since 2021, the Agency has been piloting the programme in Guyana, Saint Lucia and Barbados where focused efforts have enhanced the capabilities of local SMEs in adopting sustainable and energy-efficient practices. Prior to this, under the Productivity Network (ProNET) suite of training, Energy Management workshops were also conducted across the region.

The positive impact of these workshops on participating businesses has underscored the importance and effectiveness of hands-on, tailored training in facilitating the transition towards a green economy. Encouraged by the interest of those initiatives, Caribbean Export is looking to broaden and deepen its impact. This is driven by the recognition of the critical role that widespread adoption of green practices can play in enhancing the region's overall competitiveness and sustainability, particularly considering the pressing challenges posed by climate change and high energy costs. Through this concerted endeavour, Caribbean Export will foster a regional ecosystem that is resilient, innovative, and aligned with global sustainability standards.

### **1.2 Contracting Authority**

The contracting authority for this assignment is the Caribbean Export Development Agency and is funded by the EU's Global Gateway Regional Private Sector Development Programme III.

### **1.3 Beneficiary Countries**

The primary beneficiaries under this project are the private sector in CARIFORUM countries: (Antigua and Barbuda, Bahamas, Barbados, Belize, Dominica, Dominican Republic, Grenada, Guyana, Haiti, Jamaica, St. Kitts and Nevis, Saint Lucia, St. Vincent and the Grenadines, Suriname and, Trinidad and Tobago).

### **1.4 Target Groups**

CARIFORUM private sector.

## **2. OBJECTIVE, PURPOSE & EXPECTED RESULTS**

### **2.1 Overall Objective**

The overarching goal of this consultancy is to enhance the competitiveness of the CARIFORUM private sector through a focused capacity-building programme on green energy business practices.

### **2.2 Specific Objectives**

Specifically, the consultancy aims to:

- **Broad Needs Assessment:** Assess broadly the existing state of energy efficiency and renewable energy initiatives within the CARIFORUM region, identifying gaps, best practices, and areas for improvement to guide the conduct of targeted training.
- **Curriculum Application:** Customise existing training materials to address the capacity gaps of the CARIFORUM private sector in transitioning to green business practices. Modules

should include practical applications of renewable energy technologies and energy efficiency measures, as well as strategies for overcoming regional challenges related to energy costs and sustainability.

- **Workshop Administration:** Conduct 8 (2-3 days in person) interactive workshops for private sector firms in selected CARIFORUM countries to increase adoption of green business strategies. Workshops will have a maximum capacity of 30 participants.
- **Country Selection Consultation:** Collaborate closely with Caribbean Export in the process of selecting CARIFORUM countries for participation in the program, ensuring that the selection aligns with strategic regional priorities and the potential for impactful outcomes. The project will host 1 workshop per country to the maximum of 8 country workshops.
- **Sustainability and Scalability:** Develop a framework for the sustainability and scalability of the training initiatives, ensuring that the knowledge and practices can be adapted and expanded upon in the future, contributing to ongoing development.
- **Monitoring and Evaluation:** Establish a comprehensive monitoring and evaluation system to assess the effectiveness of the training courses and workshops, providing valuable feedback for continuous improvement.

### 2.3 Purpose of consultancy and expected results

The consultancy aims to empower the private sector within CARIFORUM countries by enhancing their knowledge and application of green business practices. This initiative is designed to enhance their competitiveness by aligning their operations with sustainable and environmentally friendly principles.

The consultancy will serve to:

- **Upskill and Enhance Knowledge:** Provide training and workshops to build the capacity of firms in understanding and implementing green business practices.
- **Facilitate Practical Application:** Ensure that the courses and workshops lead to practical implementation within business operations, thereby fostering a culture of sustainability and innovation in energy management.
- **Strengthen International Competitiveness:** By integrating best practices in energy efficiency and renewable energy, firms are expected to enhance their regional and international competitiveness.
- **Development of Sustainable Business Practices:** The consultancy will lead to the creation and dissemination of a set of sustainable business practices, tailored specifically to the needs and challenges of the CARIFORUM region, promoting long-term economic and environmental health.

The expected result is a transformative shift in the private sector's approach to energy use, driving not only cost savings and efficiency gains but also contributing to the global efforts against climate change. This shift is anticipated to enhance the region's appeal as a destination for green investment and trade, thereby opening new avenues for economic growth and development.

## 3. ASSUMPTIONS AND RISKS AND MITIGATION

### 3.1 Assumptions

- A significant demand exists within the CARIFORUM private sector for expertise and training in green business practices including energy efficiency and renewable energy.
- The modules and course content will be tailored to address the specific needs of the private sector.

- Advances in renewable energy technologies and best practices in energy efficiency will continue to evolve, offering fresh insights and opportunities for CARIFORUM businesses.
- The selected CARIFORUM countries will have the necessary infrastructure and commitment to support the implementation of energy efficiency and renewable energy initiatives.

### **3.2 Risks**

- There may be resistance or lack of receptiveness among firms to adopt green energy practices due to perceived cost implications or disruption to existing processes.
- Firms may not fully integrate the training and new practices into their strategic planning and day-to-day operations, limiting the potential impact of the consultancy.
- The needs and challenges faced by the private sector may be misrepresented, leading to misalignment between the training provided and the actual requirements of the sector.
- Potential technological and financial barriers might hinder the adoption of renewable energy solutions and energy efficiency measures by SMEs.
- Changes in policy or economic conditions in CARIFORUM countries could impact the feasibility and sustainability of the proposed interventions.
- Limited access to up-to-date data and research on renewable energy and energy efficiency could affect the relevance and effectiveness of the training modules.

### **3.3 Mitigation**

- To gauge the effectiveness of the training and ensure its practical application, firms will participate in pre- and post-training assessments. These evaluations will measure the impact of the courses on business operations and the incorporation of sustainable energy practices, providing a feedback loop for continuous improvement of the training modules.
- Conduct desk research to ensure that the consultancy's outputs remain at the forefront of sustainable energy developments.

## **4. SCOPE OF WORK**

### **4.1 Specific Activities**

Caribbean Export is seeking the professional services of a consultant/firm who will be responsible for implementing a comprehensive training and capacity-building program focused on green business practices for the private sector in CARIFORUM.

To achieve the objectives of this consultancy, the consultant will be required to undertake the following activities:

1. Tailor an existing curriculum that includes a series of modules focused on green energy practices that will equip businesses with the knowledge and skills necessary to implement sustainable energy solutions effectively. The training should reflect the current green business landscape within CARIFORUM countries, with a view to encouraging increased energy efficiency and renewable energy adoption within the private sector.
2. Conduct 8 in person workshops across the CARIFORUM region. The workshop duration is 2 – 3 days with a maximum of 30 participants, in 8 CARIFORUM countries (1 workshop in each of the 8 proposed locations).

3. Establish a framework for monitoring and evaluating the effectiveness of the training and capacity-building activities, including the development of metrics to assess the uptake of sustainable energy practices by participating firms.
4. Prepare comprehensive reports at each stage of the consultancy, documenting the activities undertaken, the outcomes achieved, and recommendations for future initiatives focused on sustainable energy within the CARIFORUM private sector.

## **5. PROJECT MANAGEMENT AND REPORTING**

### **5.1 Responsible Body**

Caribbean Export Development Agency

### **5.2 Management structure**

The Executive Director will retain overall responsibility for the overall project. Day-to-day supervision of this specific programme is the responsibility of the Manager, Competitiveness and Export Promotion, who will communicate progress to the Executive Director.

### **5.3 Reporting**

Reports outlining key activities undertaken, progress made, and results achieved, must be submitted to Ms. Natasha Edwin-Walcott, Senior Advisor Competitiveness and Export Promotion copied to Dr. Damie Sinanan, Manager Competitiveness and Export Promotion at [nwalcott@carib-export.com](mailto:nwalcott@carib-export.com) and [dsinanan@carib-export.com](mailto:dsinanan@carib-export.com) respectively.

## **6. LOGISTICS AND TIMING**

### **6.1 Commencement date and period of implementation of tasks**

This consultancy is expected to commence in May 2024 for the execution of 8 workshops, and to be completed by August 2025.

## **7. PAYMENT TERMS**

All services must be completed to the satisfaction of the Agency and payments will be contingent on submission and approval of the project reports and appropriate invoices. Payments will be made in accordance with the terms and conditions outlined in the contract between the contracting authority and the consultant.

The following payment terms are proposed:

- Upon presentation and acceptance of the Inception report, 30% of the total cost will be paid.
- Upon presentation and acceptance of Progress reports on execution of the workshops, 50% of the total cost will be paid.

- Upon presentation and acceptance of the Final Report, 20% of total cost will be paid.

## **8. REQUIREMENTS**

### **8.1 Qualifications**

- The consultant must possess a post-graduate degree in Environmental Management or Engineering, Renewable Energy, Energy Management, International Trade, International Business or other related areas.
- Proven experience in implementing training programs focused on the green energy transition such as energy efficiency, renewable energy solutions, and sustainable business practices.
- Demonstrated capability in enhancing the operational and environmental performance of SMEs, with a strong preference for experience in small states or regions with similar energy and environmental profiles.
- Previous professional engagement within the Caribbean region, showcasing an understanding of the region's energy landscape, economic context, and cultural dynamics.
- Fluency in English, with proficiency in additional languages such as Spanish, French, or Dutch considered an asset.

### **8.2 Work Experience**

- At least 7 years of relevant professional experience.

### **8.3 Required Documentation.**

- Technical proposal/concept design for delivery of services requested.
- Financial proposal, in Euros, to meet scope of works.
- Applicant Declaration form in paragraph 14.

Required documentation should be submitted to Ms. Natasha Edwin-Walcott, Senior Advisor Competitiveness and Export Promotion at [nwalcott@carib-export.com](mailto:nwalcott@carib-export.com) with a copy to Dr. Damie Sinanan, Manager Competitiveness and Export Promotion at [dsinanan@carib-export.com](mailto:dsinanan@carib-export.com) **no later than 31st March, 2024 4:00 pm AST.**

### **8.4 Office Accommodation**

N/A

### **8.5 Facilities to be provided by the Consultant**

N/A

### **8.6 Equipment**

The consultant is expected to utilise resources to ensure the adequate fulfilment of the scope of services.

### **8.7 Travel**

Travel for the trainer is expected for this consultancy. Thus, the overall budget must include all travel expenses anticipated to meet the scope of works. Reimbursements will not be considered. Costs associated with workshop venue will be met by Caribbean Export.

## 9. REPORTS

### 9.1 Reporting requirements

An Inception Report that includes a proposed project design and work plan, as well as timelines, to be presented within 10 working days of the commencement of the consultancy. Prior to the submission of the Inception Report and the commencement of the contract, the consultant will be required to attend an inception meeting (meeting to be conducted virtually if the consultant is not present in Barbados) with the Caribbean Export team.

Inception report shall include:

- The methodology and approach for conducting the consultancy.
- Proposed modules including detailed content outlines, learning objectives, and instructional methodologies tailored to the CARIFORUM private sector's needs.
- Proposed Training Plan outlining the execution strategy for the workshops and courses, including proposed schedules, participant engagement strategies, and proposed dates. Workshop dates will be agreed in consultation with Caribbean Export
- Intervention Assessment Framework: Description of the assessment framework to evaluate the effectiveness of the training interventions, including the pre- and post-training questionnaires, the criteria for success and the methodology for measuring impact.
- Identification of any potential issues, risks, and the corresponding remedies or mitigation actions to address these challenges effectively.

Progress reports shall include information on:

- The delivery of the 8 workshops including the content covered, the methodologies used, and the participant engagement strategies.

Final report shall include information on:

- The foregoing reports, activities undertaken, lessons learned including improvements in participants' knowledge, as well as insights into green business practices of participating firms and related feedback.

### 9.2 Submission and Approval of Reports

The reports and deliverables as referred to above must be submitted to Ms. Natasha Edwin-Walcott, Senior Advisor – Competitiveness and Export Promotion at [nwalcott@carib-export.com](mailto:nwalcott@carib-export.com) with a copy to Dr. Damie Sinanan, Manager, Competitiveness and Export Promotion at [dsinanan@carib-export.com](mailto:dsinanan@carib-export.com) for approval.

All reports must be submitted in English in electronic format.

## 10. EXCLUSION CRITERIA



Candidates will be excluded from participation in the bidding process if they:

- a) are bankrupt, insolvent, filing for insolvency or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) are the subject of proceedings for fraud, corruption, a declaration of bankruptcy, for winding-up, for administration by the courts, for an arrangement with creditors or for any similar procedure provided for in national legislation or regulations;
- c) have been convicted of an offence concerning professional conduct by a judgement which has the force of *res judicata*
- d) are guilty of grave professional misconduct proven by any means which Caribbean Export can justify;
- e) are guilty of serious misrepresentation in supplying the information required by the contracting authorities as a condition of participation in the procurement process; they have been declared to be in serious breach of contract for failure to comply with obligations in connection with another contract with the same Contracting Authority or another contract financed with Caribbean Export's funds;
- f) are in breach of payment of taxes or social security contributions;
- g) have been convicted or are the subject of proceedings for money laundering, terrorist offences or activities, child labour, human trafficking, being a criminal enterprise in the production of goods and services, or any other irregularity;
- h) are established as or operating as a shell company.

Any entity operating in public interest such as public health or environmental protection are also subject to the above clauses.

## **11. MONITORING AND EVALUATION**

The Consultancy will be monitored and evaluated by Caribbean Export over the duration of the project. Performance on the project will be measured by satisfactory completion and timely submission of the deliverables outlined in Section 4 and 9, and as outlined within the work plan submitted in the inception report. Feedback, other than acceptance, on each submitted deliverable is not a requirement for the continuation of the project. However, in some instances the Consultant may need to integrate any feedback into the subsequent deliverables. The Contracting Authority will provide feedback to the consultant within ten (10) working days of receipt of the final report.

## **12. SPECIAL REQUIREMENTS**

N/A

## **13. PUBLICATION OF INFORMATION**

To participate in any activity executed or supported by Caribbean Export, you hereby agree that any information and personal data that you share and is collected by the Agency will be processed for the purpose of reporting the outcomes and impact of your projects and/or participation. Please note that Caribbean Export reserves the right to publish the Contractor's/Participant's name and address, the purpose and nature of the activity, and financial arrangements, in accordance with Caribbean Export's



[Personal Data Protection Policy](#). Derogation from publication of this information may be granted if it could endanger the Contractor/Participant or harm his/her commercial interests.

#### **14. DECLARATION**

To participate in any procurement undertaken by Caribbean Export, all applicants must complete and submit to the agency the [Applicant Declaration Form](#).

All queries relating to this activity should be directed to Ms. Natasha Edwin Walcott – Senior Advisor Competitiveness and Export Promotion at [nwalcott@carib-export.com](mailto:nwalcott@carib-export.com)