

TERMS OF REFERENCE

Support to the Administration of a Grant Funding Programme to support the Green Transition in the CARIFORUM Region

1. BACKGROUND INFORMATION

1.1 Relevant background

The Caribbean Export Development Agency (Caribbean Export) is at the forefront of driving sustainable economic development across the Caribbean, a region increasingly vulnerable to the impacts of climate change. With rising sea levels, more frequent natural disasters, and environmental degradation, critical sectors such as agriculture, tourism, and energy face significant risks. A 2020 Climate Analytics study projects that by 2100, climate-related damages could consume over 20% of the region's GDP if current trends persist. Countries like Haiti and Grenada are particularly at risk, with GDP losses projected at 123.2% and 111.5%, respectively, without effective mitigation strategies.

Compounding these challenges are the region's high energy costs, with rates in the Eastern Caribbean exceeding US\$0.35/kWh—more than double the global average. This economic burden hampers business growth and long-term recovery, especially as the region continues to rebound from the COVID-19 pandemic. While Trinidad and Tobago benefits from domestic oil and gas production, the majority of Caribbean nations remain dependent on costly imported fuels, underscoring the urgent need for a green economy transition.

To address these challenges, Caribbean Export is advancing a comprehensive initiative to support the green transition, supported by the European Union's Global Gateway - Third Regional Private Sector Development Programme and other partners. This initiative focuses on renewable energy adoption, energy efficiency improvements, and sustainable business practices to foster economic diversification and resilience. The Caribbean's abundant natural resources, such as solar, wind, and marine energy, position the region as a potential leader in renewable energy. Between 2015 and 2022, renewable energy capacity increased by 51%, with 64% of electricity generation coming from renewables by 2022. However, with electricity demand projected to rise by 2.3% annually by 2050, the transition must accelerate.

A cornerstone of this green transition initiative is a grant funding program, funded by the European Union, designed to support businesses committed to adopting green technologies. At the same time, Caribbean Export in partnership with the Inter-American Development Bank, will be developing an online energy audit tool, to fill the gap in accessible energy efficiency (EE) and resource efficiency and cleaner production (RECP) services for micro, small, and medium enterprises (MSMEs). The tool when complete, will serve as additional support, providing MSMEs with critical insights into their energy practices and enabling them to align with green transition

goals. The online tool, coupled with energy audit services and RECP training programs, will be supported by Business Support Organizations (BSOs) across the region.

This strategic approach is further strengthened with this request for services to conduct an in-depth analysis of green funding initiatives across key sectors, including energy, agriculture, and infrastructure. The analysis will identify barriers, propose interventions, and draw lessons from other Small Island Developing States (SIDS) with successful green transition models. These findings will inform policymakers and ensure that grant funding is directed to areas with the highest potential for success.

Caribbean Export's initiatives are therefore critical for unlocking the transformative potential of the green economy. The program seeks to align financial support with data-driven sustainability goals. This should assist in ensuring that resources are allocated effectively, reduce carbon emissions, create green jobs, and position the Caribbean as a global model for sustainability.

1.2 Contracting Authority

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

1.3 Beneficiary Countries

The primary beneficiaries under this project are the private sector SMEs 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 main objective of this consultancy is to design a grant programme that:

- Promotes sustainable business practices across CARIFORUM's private sector.
- Aligns with both national and international green transition goals.
- Encourages applicants to integrate Environmental, Social, and Governance (ESG) criteria into their business proposals.

- Maps and engages key stakeholders in the green sector to identify grant opportunities and foster strategic partnerships that enhance the impact and reach of the program.

This consultancy is pivotal to ensuring that the program successfully advances green transition efforts while fostering innovation and sustainability within the Caribbean’s private sector. By mapping the types of green projects that can be transformative, and establishing transparent and effective procedures, the consultancy will help direct investments towards initiatives that not only drive economic growth but also contribute to long-term environmental resilience and social responsibility.

3. ASSUMPTIONS AND RISKS AND MITIGATION

3.1 Assumptions

- The success of this analysis and the green transition framework assumes a functioning enabling environment and active participation from all relevant stakeholders, including governments, private sector actors, civil society organizations, and international bodies.
- There is an assumption that the necessary technology for green initiatives, such as renewable energy systems, waste management, and sustainable agriculture practices, will be accessible and adaptable within the region.

3.2 Risks

- The green transition could face difficulties if policies and regulations are not aligned to support green investments and initiatives.
- Some stakeholders, including governments, private sector entities, or local communities, may resist changes brought about by the green transition, especially if they perceive short-term losses.
- Access to and adoption of the required green technologies may be limited due to cost, infrastructure challenges, or a lack of technical expertise in the region.
- The Caribbean is highly vulnerable to natural disasters, and any major climate event could disrupt green transition efforts or delay their implementation.

3.3 Mitigation

- Conduct thorough assessments of current policies and propose necessary adjustments or new regulations that encourage and facilitate green investments and sustainability initiatives.
- Engage stakeholders early through consultations and workshops to foster buy-in, address concerns, and communicate the long-term benefits of the green transition for economic and environmental resilience.

- Emphasize building technical capacity, fostering partnerships with countries that have successfully implemented green technologies, and creating incentives for technology providers to enter the Caribbean market.

4. SCOPE OF WORK

4.1 Specific Activities

The consultant will be responsible for but not limited to the following activities:

- **Research International Best Practices**

Research the global best-practice in grant funding programs focused on sustainability and the green transition in the private sector. This will involve examining successful grant models from different regions inclusive of SIDS, developing and developed nations. The analysis of the strategies used by the grants to incentivize and promote sustainability and the green transition across the global private sector should inform the adaptation or development of a suitable program for deployment in the Caribbean context. This research will form the foundation for the drafting and presentation of grant administrative and management procedures that are both effective and contextually relevant. This should include, as part of its reports, the following:

- **Phase 1: Research and Data Collection**

- Regional and International Grant Facilities

Identify and assess regional and international grant programs that support sustainability efforts, with a particular focus on climate-smart agriculture and resilience in green sectors. Include grants related to renewable energy, waste management, and sustainable agriculture.

- Stakeholder Mapping

Conduct a comprehensive mapping of key stakeholders actively supporting green initiatives through funding or technical assistance. This includes identifying multilateral agencies, regional organizations, NGOs, and private sector entities. Develop a database categorizing stakeholders by their focus areas, funding mechanisms, and partnership opportunities.

- Type of Administration/Governance

Explore the governance and operational models managing these grants, such as public-private partnerships, governmental agencies, or independent organizations. Highlight successful models that ensure accountability and promote collaboration.

- Analysis

Examine the grant application processes, including eligibility requirements, selection criteria, and key performance indicators (KPIs). Identify the best practices and barriers to accessing these grants, with actionable insights for CARIFORUM stakeholders.

- Types of Projects Funded

Identify the categories of projects that receive funding, such as renewable energy projects, waste management and recycling initiatives, sustainable agriculture and water conservation, eco-tourism ventures and carbon emission reduction programs. Insights into the impact that these grants would have had on the firm level should also be included.

- Implementation Period

Review typical timelines for implementation and evaluation of funded projects, focusing on medium and long-term initiatives (1–2 years). Highlight examples of successful projects with lessons learned for adaptation to the Caribbean context.

- **Phase 2: Adaptation to Caribbean Context**

Provide analysis of how global grant models can be tailored to meet the specific needs and challenges faced by the Caribbean region. Consider environmental vulnerabilities, economic size, and local industries.

- Assess any existing regional programs or initiatives in the Caribbean related to sustainability and provide a comparison with global practices.
- Based on research, the consultant should deliver a shortlist of at least 10 priority areas for Caribbean Export to target, any opportunities for country specific focus should also be identified.
- Highlight areas with the greatest potential for economic and environmental impact, considering the feasibility of adoption and implementation.

- **Phase 3: Recommendations for Funding Categories**

Based on research findings, identify which types of expenses should be covered under each focus area, such as:

- Technology and Infrastructure Investments: Procurement of green technology (solar panels, efficient irrigation systems, recycling equipment).
- Research & Development: Costs related to developing innovative solutions for sustainability challenges.
- Technical Assistance and other needs

For each project focus area, the consultant will provide a detailed breakdown of expected costs, including:

- Capital investments (e.g., renewable energy installations, waste processing plants)
 - Research costs (e.g., data collection, pilot projects, market studies)
 - Technical Assistance and any other specific needs
- Create detailed criteria for evaluating the sustainability of grant proposals. This criterion will focus on the environmental impact of proposed projects, alignment with green transition objectives, potential for economic growth, and long-term sustainability. The criteria will serve as the foundation for assessing the viability and potential impact of projects seeking funding.

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- Technical Programmes, who will communicate progress to the Executive Director.

6. LOGISTICS AND TIMING

6.1 Commencement date and period of implementation of tasks

The expected start date for the consultancy is **February 1, 2025, and conclude on April 15, 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 progress report and appropriate invoice. 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 Report 1, 20% of the total cost will be paid.
- Upon presentation and acceptance of Report 2, 30% of the total cost will be paid.

- Upon presentation and acceptance of Report 3, 30% of the total cost will be paid.
- Upon presentation and acceptance of Report 4, 20% of the total cost will be paid.

8. REQUIREMENTS

8.1 Qualification and Experience

The consultant should possess the following qualifications:

- Post Graduate Degree in Business, Management Studies, Economics, Finance, Engineering, Analytics or a related field, plus 7 years qualifying experience.
- Demonstrated experience in researching and administering grant or financial programmes, particularly in the fields of green business practices.
- Strong understanding of sustainability principles and technologies.
- Demonstrated project management and organisational skills.
- Demonstrated ability to work collaboratively with diverse stakeholders.
- Strong analytical and excellent oral and report writing skills.
- Good understanding of the CARIFORUM private sector and knowledge of the business climate in the region.
- In-depth knowledge of sustainability and the green economy transition.
- Familiarity with the Caribbean context, particularly challenges faced by SIDS.
- Ability to present actionable insights that consider both environmental impact and economic viability.

8.2 Required Documentation.

Interested candidates should submit the following:

- A detailed CV highlighting relevant experience.
- A technical proposal outlining the approach and methodology for the consultancy.
- A financial proposal detailing the consultancy fees, in EURO.
- Contact information for at least two professional references.
- Signed Application Declaration in paragraph 14.

All applications must be submitted by email to gegp@carib-export.com and copied to Mr. Wayne Elliott, Manager – Technical Programmes at welliott@carib-export.com, **no later than 4:00 pm AST on January 3rd, 2025.**

8.3 Office Accommodation

N/A

8.4 Facilities to be provided by the Consultant

N/A

8.5 Equipment

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

8.6 Travel

Travel is not anticipated for this assignment.

9. REPORTS

9.1. Reporting requirements

- **Report 1 and Virtual Presentation (Inception Report)**

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**. This report will outline the consultant's proposed approach and methodology for the project. It will include a detailed plan for the research and analysis, timelines for each phase, and any anticipated challenges or considerations. The report will also ensure alignment between the consultant and Caribbean Export regarding the project's objectives and deliverables.

- **Report 2 and Virtual Presentation - Phase 1 (Global Research & Data Collection)**

This report will analyze successful grant models, including funded project types, administrative frameworks, and implementation periods. It will also map key stakeholders in the green and climate-smart agriculture sectors, highlighting funding opportunities and potential partnerships.

- **Report 3 and Virtual Presentation Phase 2 (Adaptation to Caribbean Context & Shortlist of Recommended Areas)**

This Report must include adaptation strategies for the Caribbean, including specific recommendations for Caribbean Export and shortlisted project areas and proposed evaluation grid.

- **Report 4 and Virtual Presentation (Final Report)**

This Report must be presented as a comprehensive report including full recommendations for Caribbean Export's grant programme and breakdown of relevant expenses per project area.

9.2 Submission and Approval of Reports

The reports referred to in 9.1 above must be submitted to Mr. Wayne Elliott, Manager – Technical Programmes at welliott@carib-export.com and copied to gegp@carib-export.com. All reports must be submitted in English and in electronic format. The Manager- Technical Programmes is responsible for approving all reports.

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 the 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 Sections 5. 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. [Personal Data Protection Policy](https://content.carib-export.com/download/personal-data-protectionpolicy/).(https://content.carib-export.com/download/personal-data-protectionpolicy/).

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. <https://content.carib-export.com/download/applicant-declaration-form/>.

All queries relating to this activity should be directed to gegp@carib-export.com.