

## TERMS OF REFERENCE

### CONDUCTING MINARET VALUE CHAIN MAPPING & IDENTIFYING PROJECT-SPECIFIC STAKEHOLDER CAPACITY BUILDING NEEDS

**Location:** Al-Karak – Jordan or/and Monastir – Tunis or/and Jdeidet Al-Shouf – Lebanon

**Duration:** Up to Four months from the date of signing the contract

**Starting date:** 18 October 2018

**End date:** Based on contract, maximum by 18 February 2019

## BACKGROUND

### *What is the Project?*

*“The MENA Region Initiative as a model of the NEXUS Approach to Renewable Energy Technologies” (MINARET)*, is a project designed to be implemented over four years in partnership with municipalities in three different countries: Tunisia, Lebanon, and Jordan. It is the first Project in the region that utilizes a nexus approach to address the unique sustainability challenges and opportunities that face each of the countries from a local municipal level with regards to water, energy and food security.

The Project is also the first Project in the region which facilitates dialogue between the experts and players from the public and private sector in renewable energy, sustainable development, water, climate change, and many more sectors. Stakeholders from all around the region discuss and plan together how to overcome the increasing constraints their countries and the region faces through fundamentally rethinking how we produce and consume energy in relation to the water and food sectors.

Finally, on an international scale, the Project timely and exciting and is drawing the attention of experts, stakeholders and decision makers worldwide. This is because it tackles many of the world’s priority challenges (the Project addresses five of the UN Sustainable Development Goals: SDG 5- Gender equality, SDG 6- Water, SDG 7- Affordable and clean energy, SDG 11- Sustainable cities and communities, and SDG 13- Climate action). It is also because the Project utilizes the latest and most relevant framework of action worldwide. That is: the renewable energy, energy efficiency, water management and efficiency, and food security sectors are interlinked. Therefore, we must leverage existing synergies, bridge the gap, and bring together key stakeholders from across those sectors to achieve simultaneous gains in all those sectors at once.

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#### *Why is WEF NEXUS important?*

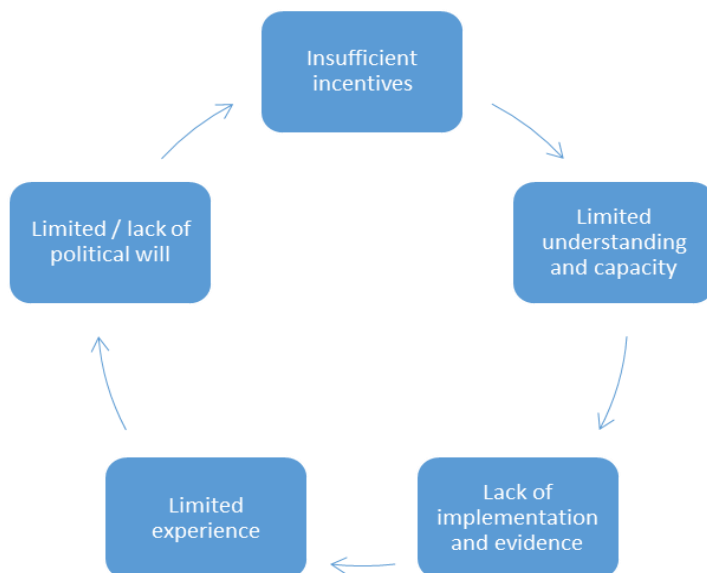
NEXUS is an extremely effective approach that must be used in addressing the challenges facing the MENA region with regards to overcoming resource challenges, improving human securities, providing additional employment, and contributing to political stability. However, MENA countries have made little progress in adopting and implementing this approach.

#### *What are key obstacles in the way of implementing WEF NEXUS approach?*

##### **National Level**

There are several obstacles and constraints responsible for the unremarkable progress made in adopting and implementing the NEXUS approach. These include insufficient incentives for integrated policy planning, lack of economic incentives for developing integrated business solutions, and limited vision, knowledge and experience with the nexus. In turn, the lack of implementation and hence of empirical evidence of the benefits of a nexus approach, does little to strengthen political will for the development of enabling structures and procedures. Also businesses and investors are waiting for visible evidence of the added value from a nexus approach. Without this political will and when business opportunities are not realized, there is no nexus implementation.

In short, countries are stuck in a vicious cycle:



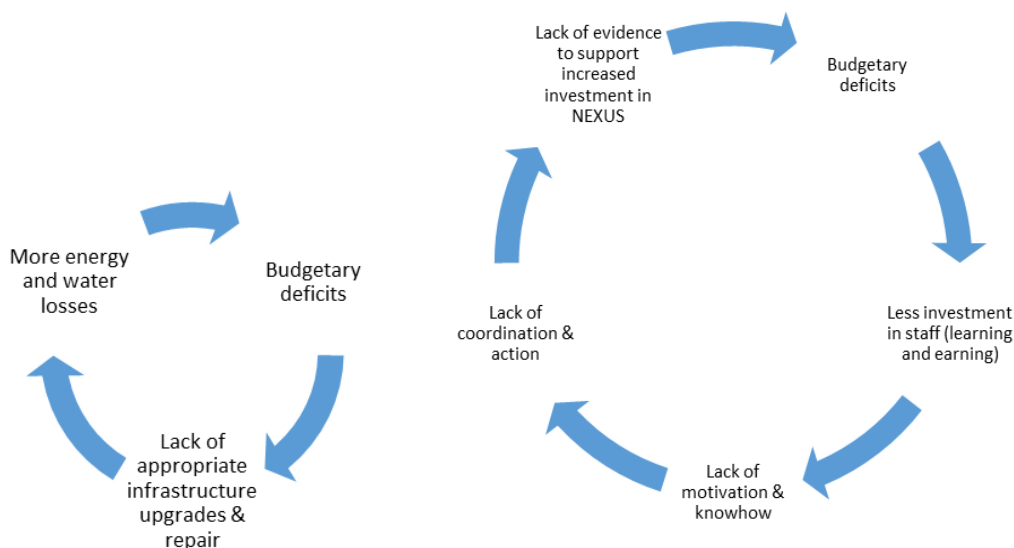
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#### Municipal Level

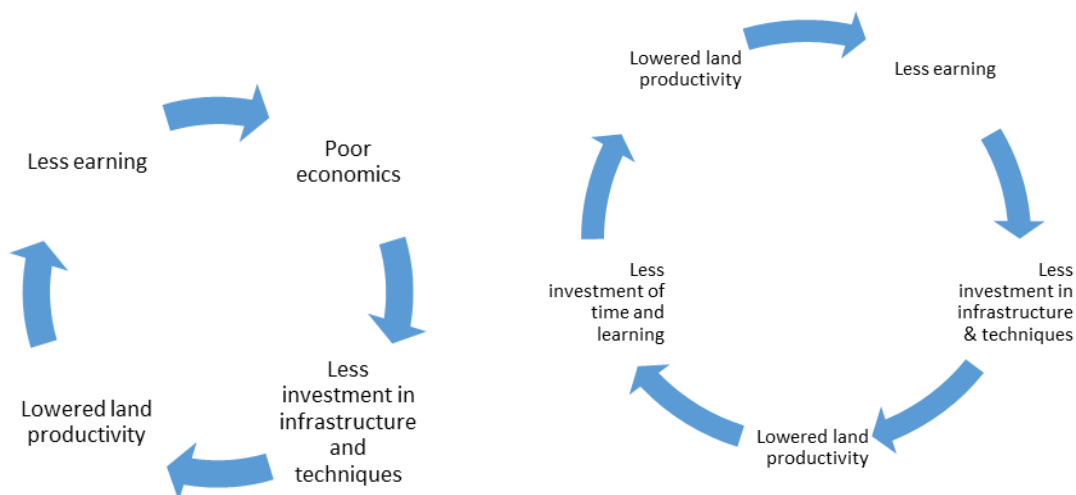
Similarly, municipalities are also stuck in a similar vicious cycle.

There are many vicious cycles municipalities are stuck within:



#### Citizen Level

Citizens themselves are stuck within a vicious cycle which contributes to the continued mismanagement and loss of scarce resources:

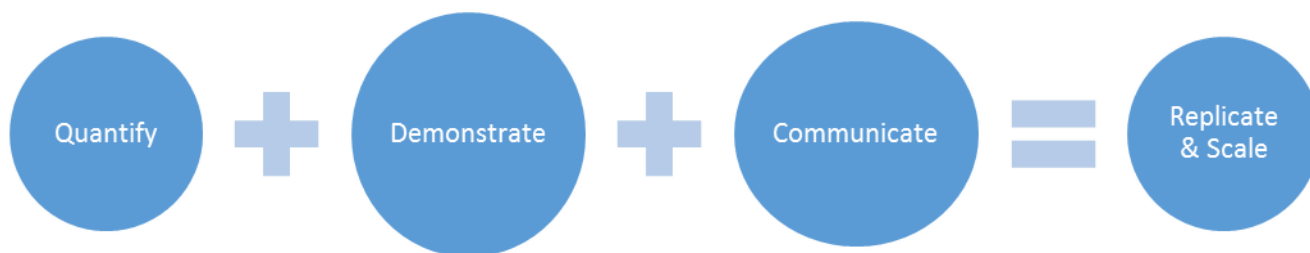


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#### MINARET Project Provides an Alternative

In order to break the vicious circle, **pilot projects are required which demonstrate benefits and added value of the nexus approach.** It is however insufficient to implement pilot projects on the municipality level and/or on the level of the community if a scientific NEXUS approach is not used where the benefits and co-benefits are quantified. Also, a pilot project to become scalable and replicable must be communicated properly. It must be communicated horizontally with others for the purpose of replicating it. It also must be communicated vertically for the purpose of making the necessary policy changes / incentives to expand and scale it. Therefore, to be successful, we must



#### *Contracting Authority*

The aforementioned assignment will be divided between the two contracting authorities below (Horizons for the Value Chain Mapping, & IUCN for the Stakeholder Engagement – description of assignment detailed in “The Assignment”).

The Contracting Authorities are:

#### **Horizons for Green Development**

Horizons for Green Development is a Jordanian not for profit organization registered in 2014 specializing in green development, water, and renewable energy activities. Horizons has one office in Jordan and its branch in Tunis.

Horizons adopts the NEXUS approach which Strengthens Capacities and Awareness on Communication and Cooperation on Water, Energy, and Food Security Challenges and its Goals within the 2030 Agenda for Sustainable Development. Since inception, the organization has aimed at developing civic engagement and socio-economic projects; environment and climate change projects, and WASH initiatives through capacity building, developing infrastructure, and raising knowledge and awareness on environmental issues.

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#### **International Union for Conservation of Nature (IUCN)**

IUCN focuses on valuing and conserving nature through ensuring effective and equitable governance of its use, and deploying nature-based solutions to global challenges in climate, food and development. It supports scientific research, manages field projects all over the world, and brings governments, NGOs, UN and companies together to develop policy, laws and best practice.

IUCN is the world's oldest and largest global environmental organization, with almost 1,300 government and NGO Members and more than 15,000 volunteer experts in 185 countries. Almost 1,000 workers in 45 offices and hundreds of partners in public, NGO, support our work and private sectors around the world.

#### ***The Assignment***

##### **Background**

The MINARET team has conducted Renewable Energy, Energy Efficiency, Water, Agriculture, Socio-economic, Stakeholder Mapping and Gender assessment studies in each of the MINARET Project countries. These studies provide the necessary situational analysis which based upon, the Project Team designs and then implements NEXUS Pilot Projects and Socio-economic Projects.

These studies include all data collected, analysis, and proposed water & agriculture projects as well as socio-economic projects, that are available to build on for the upcoming assignment.

***The Water & Agriculture Projects (Pilot Projects)*** are implemented in partnership with municipalities; the Pilot Projects' scope centers around applying WEF NEXUS thinking to improve municipalities' ability to reduce their consumption of energy and water, to better deliver on their core mandate services and to expand their developmental role.

##### **What was done:**

- For the three baseline studies, local consultants from each country were assigned to carry out data collection and analysis of the study. The structure of the studies was provided by MINARET team to ensure consistency of the information provided.
- A consultant from Jordan was assigned to review all three baseline studies to ensure accuracy and quality of the content, as well as reliability of interventions proposed and make changes.
- A third party (WANA institute), was assigned to List recommendations, based on the reviewed information, on how the baseline studies and the associated information should be modified to yield more accurate and definitive final report. And finalize the three country baseline studies.

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- Data was collected through review of literature; reports and studies obtained from online sources, governmental institutions, NGOs, the municipalities; review of national policies, laws, and regulations governing the water and agriculture sectors; and through field surveys and consultation with all stakeholders involved in water/agriculture sectors, including local authorities, mayors, representatives from local NGOs/CSOs, and farmers.
- Pilot Project briefs in each of the municipalities.

The ***Socio-economic Projects*** are implemented in partnership with local community based organizations and NGOs; their scope centers around applying NEXUS thinking to benefit community members in reducing their energy and water consumption and improving the competitiveness of their revenue-generating services / products.

#### What was done:

- A local consultant was assigned to conduct three baseline studies with his team.
- A desktop review was carried out to enhance the current understanding on the studied municipalities.
- A review of existing books, literatures, and articles either published or unpublished was carried out.
- A total of two structured questionnaires were designed and developed to capture the needed information at household and institutional level, where the later included two questioners for the governmental and non-governmental institutions. This was done to the absence of pre- data on the socio-economic status in the study areas.
- A total of three focus groups discussions were held within each municipality, targeting women, men, youth as well as officials.
- Data was analyzed and results were shared and explained to each Municipality and its CBOs and got their acceptance except for Al Karak where they prefer to have the small initiative as part of the municipality's pilot action and under their umbrella (which is not in line with the MINARET objective) so more discussions will take place to get their acceptance.
- Socio-economic Project briefs in each of the targeted municipalities.

#### **Purpose of Assignment**

In order to ensure that the Pilot Projects & Socio-economic Projects implemented can provide real and tangible impact, this Assignment includes two key components to be conducted:

1. Value Chain Mapping and products definition for Pilot Projects and Socio-economic Projects resulting in Detailed Project Documents, focusing specifically on product(s) definition and development.

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2. Stakeholder Engagement & Project-specific Capacity Building Plan: mapping with stakeholders their roles, responsibilities, current capacities and needed capacities to be built through MINARET Project that will enable them to successfully perform their role.

#### *Value Chain Mapping*

The data collected from the assessments conducted in each of the Project countries comprise a good portion of the value chain map. Additionally, the Project Team has mapped the energy and water inputs, the key stakeholders and their role and support to the Projects. Finally, the Project Team has developed the concepts (including Project description, key goals and objectives, implementation location, Projects' costs, targeted groups, roles & authorities) in consultation with the key stakeholders including but not limited to municipalities and key community based organizations and NGOs.

With this in mind, the overall goal of this assignment is to map, end to end, the proposed Pilot Projects and Socio-economic Projects, filling in the gaps which were not assessed / studied, focusing on Product(s) definition and development.

The Consultant will conduct the mapping to enhance the competitiveness of the Pilot Projects and Socio-economic Projects, define the end products and markets resulting from the Projects proposed by the Project Team. The Consultant will provide detailed and ready-to-be-implemented Projects' plans that ensure that the Projects, when implemented, are competitive; deliver maximum value within the proposed project budgets.

This assignment must provide the comprehensive understanding which would allow the project team which will implement the pilot projects and/or socioeconomic projects to maximize the short and more importantly long term impact of those projects. The key impact can be realized through the Projects' ability to:

- a. Increase revenue;
- b. Reduce production costs;
- c. Increase potential for income generation (number of people & amount of earning);
- d. Reduce environmental footprint;
- e. Ability to continue providing benefit and furthering impact during the duration of the Project and beyond.

The value chain mapping must cover the entire cycle of inputs, production, packaging, distribution, and market entry & sale.

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#### ***Stakeholder Engagement***

The overall goal of this assignment is to expand on the Stakeholder Engagement Assessment conducted during Year 1 for the purposes of detailing capacities and needs relevant to planning, implementation & monitoring of Pilot Projects, Socio-Economic Projects.

Through this assignment, the consultant is responsible for engaging stakeholders in a participatory manner and ensuring that:

1. Consensus is garnered around selected Projects, the scope of their intervention, and priority hands-on placement and training opportunities;
2. Selected stakeholders are trained to present the chosen Projects and interventions to ensure the buy-in & engagement of municipal councils;
3. Stakeholders together map and agree upon the project activities, deliverables, outputs, outcomes, impacts, indicators of success and means of verification;
4. Stakeholders together allocate between themselves the roles, responsibilities, and authorities needed to execute the Proposed Pilot Projects and Socio-Economic Projects;
5. Based on the responsibilities of each stakeholder and their overall role / mandate, their current capacities are mapped and the capacities which must be developed to ensure successful execution of their proposed activities and therefore successful implementation of Project are identified in full detail;
6. Detailed Project documents and Capacity Building Plans are synthesized, prepared and approved.

#### **Geographical Scope**

The consultant is expected to cover three municipalities: 1) Al Karak Municipality in Jordan, 2) Monastir Municipality in Tunisia, 3) Jdeidet Al-Shouf in Lebanon.

The value chain mapping must be conducted focusing on proposed Pilot Projects and Socio-economic Projects. The mapping must be conducted within the borders of the governorate, except for the distribution, market entry and sales where the scope may extend nationally / regionally.

#### **Scope of Assignment**

Tasks	Deliverables	
Planning		
Establish the parameters of the Value Chain Mapping and Project-specific Stakeholder Capacity Building Needs	Approved	Assignment



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assignment.	Parameters
Revise and approve the methodology used for conducting the value chain mapping and for identifying Project-specific stakeholder capacity building needs.	Approved methodology
Conduct a desktop review and hold meetings / focus groups / interviews with MINARET Project key partners, focal points and municipalities to gain a deeper understanding of MINARET, its objectives, Theory of Change, the results of the Assessments conducted and the proposed pilot-projects and socio-economic projects in each municipality.	Approved methodology and detailed assignment work-plan
Design detailed value chain work plan for each of the projects in each of the municipalities.	
Develop all the templates and tools which will be used for the assignment	Approved templates and tools
Establish the selection criteria and process for optimizing the Pilot Projects & Socio-economic Projects.	Approved selection criteria
<b>Data Collection &amp; Analysis</b>	
<p>Collect additional relevant data through:</p> <ol style="list-style-type: none"> <li>1. Desktop Review</li> <li>2. Interviews / Meetings with Stakeholders &amp; relevant Decision-makers</li> <li>3. Focus groups</li> </ol> <p>The data collected includes: a) the structure of the chain which include end markets, business enabling environment, vertical and horizontal linkages as well as supporting markets, &amp; b) the dynamics of the value chain which include the relationships and formal / informal power/authority dynamics between buyers, sellers, services providers and regulatory institutions, the nature and quality of the interactions between stakeholders in the value chain and the proposed upgrades by various stakeholders.</p>	<ul style="list-style-type: none"> <li>• Approved data collection plan.</li> <li>• Archived soft copies of all the reports used in the assessment.</li> <li>• Minutes of meetings for interviews &amp; focus groups.</li> </ul>

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<p>Analyze data using value chain framework.</p> <ol style="list-style-type: none"> <li>1. Identify key opportunities, which the project can tap into and support in order to maximize the success of the achieving the aforementioned impacts through implementation of the pilot projects / socio-economic projects.</li> <li>2. Identify the key players, which support the cycle of provision of goods and services offered through the pilot projects and/or socioeconomic projects</li> <li>3. Identify any key institutional and/or structural challenges and capacity-related setbacks, which would prevent the socio-economic projects and/or pilot projects to succeed in achieving the objectives outlined above.</li> </ol>	<ul style="list-style-type: none"> <li>• Approved value chain report.</li> <li>• Approved value chain mapping diagrams.</li> </ul>
<p>Provide Value Chain narrative reporting and develop visual diagrams depicting value chain structure from raw material to end markets</p>	
<p><b>Priority Projects Selection &amp; Design to Optimize Competitiveness</b></p>	
<p>Based on opportunities and challenges, present various scenarios for the design and implementation of the Pilot Projects and Socio-economic Projects, which take into consideration the opportunities, challenges, risks, benefits, and potential impact.</p>	<p>Approved Project scenarios.</p>
<p>Hold a Stakeholder Prioritization of projects session to build consensus around Pilot Projects &amp; Socio-economic Projects &amp; Job placement / hands-on training opportunities and agree on Projects in each of the Project municipalities</p>	<ul style="list-style-type: none"> <li>• Approved agenda of meeting.</li> <li>• Minutes of Meeting.</li> <li>• Project concept notes approved by stakeholders in meeting.</li> </ul>
<p>Hold a workshop with stakeholders to finalize for each project:</p> <ol style="list-style-type: none"> <li>1. Activities</li> </ol>	<ul style="list-style-type: none"> <li>• Approved detailed Project Plans according to approved templates.</li> </ul>

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<ol style="list-style-type: none"> <li>2. Deliverables</li> <li>3. Outputs</li> <li>4. Outcomes</li> <li>5. Impact</li> <li>6. Indicators of Success</li> <li>7. Means of Verification</li> <li>8. Roles, Responsibilities, &amp; Authorities</li> <li>9. Existing Capacities as they Pertain to Role</li> <li>10. Needed Capacities to be developed</li> </ol>	<ul style="list-style-type: none"> <li>• Approved stakeholder / partner engagement plan.</li> <li>• Approved report assessing capacity of each partner.</li> <li>• Approved Project organizational structure, decision-matrix.</li> <li>• Approved capacity development plan for Project partners.</li> </ul>
<p>Train and supervise select stakeholders to present the chosen Projects and interventions to ensure the buy-in &amp; engagement of municipal councils.</p>	
<p>Synthesize and deliver final detailed Pilot Projects and Socio-economic Projects documents for the projects which will be implemented, &amp; capacity building plans</p>	
<p>Throughout the Project:</p> <ol style="list-style-type: none"> <li>1. Provide bi-monthly email updates to Project Team;</li> <li>2. Provide hands-on training for Project Team &amp; select relevant stakeholders.</li> <li>3. Arrange and coordinate on each project activity &amp; communicate key milestones ahead of time to Project Team &amp; with focal points.</li> </ol>	<ul style="list-style-type: none"> <li>• Bi-monthly progress emails.</li> <li>• Sign-in sheets of trained stakeholders.</li> </ul>

#### Duration of Assignment

30<sup>th</sup> September 2018 – 31<sup>st</sup> January 2019

#### *Bidding*

#### Eligibility Requirements:

Candidates must meet the following eligibility requirements:

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- Candidates must have relevant value chain mapping experience with at least two projects, one of which at a value of at least 100,000 JOD.
- Candidates must have at least 5 – 7 years of experience working within the socio-economic sector.
- Candidates must have demonstrated experience in community and relevant stakeholder engagement and data collection (both qualitative and quantitative).

#### **Bidding Information:**

The bid shall be comprised of four parts which should take into consideration the parameters outlined above: 1) Narrative Proposal, 2) Key Personnel 3) Past Performance, 4) Financial Proposal.

The bidder must submit:

1. Narrative Proposal as per the template attached
2. Financial Proposal as per the template attached
3. Company Relevant Past Experience and references
4. CVs of the key experts to be mentioned in the technical offer.

Offers will be evaluated based on the following:

<b>Narrative Proposal</b>	35%
<b>Key Personnel</b>	15%
<b>Past Experience</b>	20%
<b>Cost</b>	30%

#### **Important Deadlines**

<b>Date of Announcement</b>	19 September 2018
<b>Date of Proposal Submission</b>	26 September 2018
<b>Announcement of Shortlisted Companies</b>	2 October 2018
<b>Presentations by Shortlisted Bidders</b>	8 October 2018
<b>Date of Final Submission of Revisions</b>	11 October 2018

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<b>Date of Awarding</b>	18 October 2018
<b>Date of Final Approved Submission of Assignment</b>	18 February 2019 maximum

#### Important Notes:

- A.** The bidder must be a company in good standing registered in Jordan and/or Lebanon and/or Tunisia.
- B.** One party implementing the Value Chain Mapping & Stakeholder Capacity Building Needs Mapping in all three Project countries / municipalities is preferred and will be given priority should it score comparably. However, a bidder may choose apply for one or two country(ies) / municipality(ies) and their application will be accepted and duly reviewed.
- C.** Should the assignment include more than one bidder, coordination meetings will be arranged between the implementing parties to ensure that the methodology, plan and tools are developed / revised and approved to standardize the work between countries.
- D.** In order to successfully carry out the aforementioned tasks, candidates must:
  - a. Engage relevant stakeholders in a participatory and rights-based approach as key partners in the Project. Therefore, the bidder must demonstrate the participatory and rights-based methodology in the submitted proposal. A strong participatory and rights-based methodology will be part of the overall score of the bidder. Specifically, the team will look at:
    - i. Proposed participatory approach within a rights-based methodology;
    - ii. Previous experience employing a participatory human-rights based approach;
  - b. Apply a gender-equitable, cross-cutting strategy which ensures that no one is left behind. Therefore, the bidder must demonstrate this approach / strategy in the submitted proposal. A strong cross-cutting approach based on a rights-based method will be part of the overall score of the bidder. Specifically, the team will look at:
    - i. Proposed cross-cutting strategy within a rights based approach;
    - ii. Previous experience implementing cross-cutting action
    - iii. Presence of women / marginalized people in the Project Team.
  - c. Support findings through the use of qualitative and quantitative data

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- d. In each country, MINARET Project has a focal point which acts as a link between the MINARET Team and the Municipalities, CBOs, NGOs and other key stakeholders. The contracted party(ies) must therefore collaborate and work alongside local partners to acquire relevant data, ensure approvals are obtained where necessary, and conduct the value chain mapping activities.
- e. Spend time in the field and with municipalities & NGOs / CBOs as needed.
- E. The proposal must be submitted in Arabic and/or English. The technical proposal must not exceed 15 pages.
- F. As the assignment will require reading material and speaking with people who speak Arabic and/or English and/or French, good command of all three languages is required for these purposes (communication with stakeholders & reading material in desktop review phase).
- G. The reports will be submitted in both English & Arabic.
- H. The reports must be submitted according to the templates provided by the contracting authority. All documents must be properly proof-read for grammar, language use, and formatting. The standard rate of proofreading will be deducted from the payment for that deliverable on documents where proof reading was not conducted.
- I. The successful candidate will be responsible for completing the following tasks and deliverables within the proposed timeline. Any unauthorized delays that are a result of the consultant's failure to deliver on time will be deducted from the payment of that component.
- J. Comprehensive Water, Energy, Socio-economic and gender-specific assessments have been conducted in the inception phase, therefore, the majority of the needed technical and non-technical (such as attitudes, perceptions, behavior etc) information is available.
- K. The price provided must be in USD and must be fully inclusive.
- L. The bidder will provide the price for travel & accommodation separately.
- M. The bidder can email, call or meet with us at any time during the first 10 working days from the announcement of the tender.

#### Disclaimers:

- a. Future Pioneers/Horizons may cancel solicitation and not award;
- b. Future Pioneers/Horizons may reject any or all responses received;
- c. Issuance for solicitation does not constitute award commitment by Future Pioneers/Horizons;
- d. Future Pioneers/Horizons will not compensate offerors for response to solicitation;
- e. Future Pioneers/Horizons reserves the right to issue award based on initial evaluation of offers without further discussion;

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- f. Future Pioneers/Horizons may choose to award only part of the activities in the solicitation, or issue multiple awards based on solicitation activities;
- g. Future Pioneers/Horizons reverse the right to waive minor proposal deficiencies that can be corrected prior to award determination to promote competition.

**“MINARET project and partners believe in equal opportunities and follow competent selection procedures to ensure quality outcomes in all of its assignments”**