



nexus



## TERMS OF REFERENCE

### Expert - Access to Finance at Municipal Level

Location: Jordan, Tunisia and Lebanon

Duration: 8 Months

Starting date: 10 May, 2022

End date: 30 December, 2022

#### General information

##### 1.1 Introduction

Under the agreement between Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and The Royal Scientific Society (No 86/2021), GIZ supports the core activities of phase two of The MENA Region Initiative As a Model of Nexus Approach and Renewable Energy Technologies (MINARET) project being implemented in MENA countries Jordan, Lebanon and Tunisia. The project is being implemented by the Royal Scientific Society / National Energy Research Center (RSS/NERC).

RSS/NERC is looking for a consultant with targeted expertise and technical assistance in the field of access to finance and local investment strategies.

#### What is the Project?

(MINARET) "The MENA Region Initiative as a model of the NEXUS Approach to Renewable Energy Technologies" has focused in its first phase on applying a set of context-specific critical interlinkages between water, food and energy used as inputs into systems for providing essential services to habitants. These natural resources were deeply intertwined and interconnected to come out with NEXUS model that was locally and regionally applied at municipal level in (Jordan, Lebanon and Tunisia) for the purpose of obtaining a value and determining the future needs. In addition, MINARET succeeded to understand the developmental and consumer role of municipalities, their core mandate, opportunities, as well as challenges in order to catalyse municipalities to apply NEXUS thinking to increase resource efficiency and improve the livelihood and resilience of citizens within municipalities.

MINARET in its phase two aims to improve people's lives by helping municipal governments to secure the funds and develop the skills they need to deliver high-quality public services, in particular with regard to integrated natural resources management. The project intends to build the involved municipalities' resilience to climate change by adopting an action plan for increased renewable energy usage, energy efficiency practices, water management techniques, and food security tools. In addition, through promoting policy dialogue, implementing capacity-building programs as well as providing inter-municipal regional cooperation to enhance good governance, the project in its second phase attempts to strengthen the institutional capacities of relevant governmental authorities involved in the project. Using a participatory approach, project stakeholders and partners developed the NEXUS Model, for use in building several demonstration projects, which were designed to respond to the needs of the municipalities and to ensure an improved sustainable livelihood status.



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**Approach:**

1. Climate resilient municipalities: Membership in Covenant of Mayors - Strengthening municipal capacities to plan and manage climate change adaptation and mitigation measures (development of SECAP).
2. Horizontal and vertical policy coordination and project planning as well as outreach work.
3. Finance readiness: Funding is secured for integrated projects targeted at climate resilience facilitated through an increased dialogue between financiers and public and private project developers, capacity development and targeted advisory support.

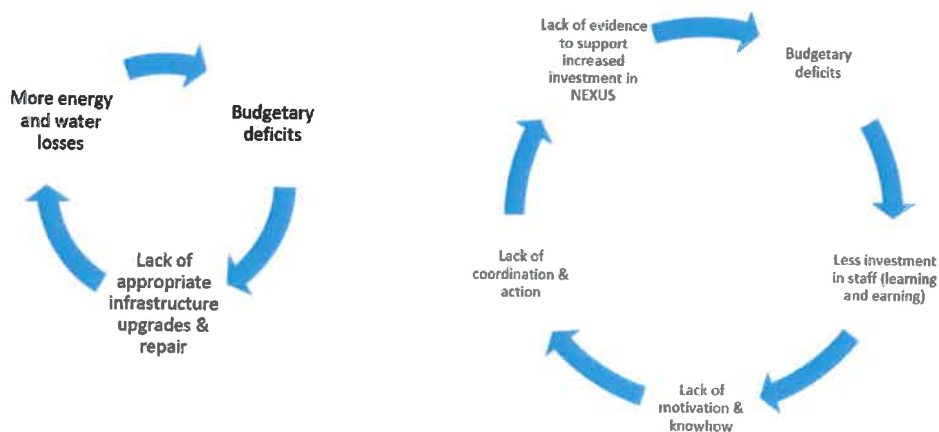
**Rationale of the Initiative**

The NEXUS approach helps address the challenges facing the MENA region with regards to overcoming resource challenges, improving human securities, providing additional employment, and contributing to political stability. However, while the approach is practiced already at project level and partially in strategy development, local and national institutions have not created a governance framework for the systematic application of this integrated policy-making approach.

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

There are several obstacles and constraints responsible for the slow 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 on how to operationalize 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, similarly the municipalities and the citizens are stuck within a vicious cycle which contributes to the continued mismanagement and loss of scarce resources:



## The Assignment

### *Access to Finance Assignment Objectives*

This mission comes **to capitalize on the work achieved in phase I, and will build on the law/regulatory assessments and models that were developed in the early phase of this regional project in the three countries.** Accordingly, the consultant will work with eight selected municipalities in Jordan, Lebanon, and Tunisia to accelerate investment for integrated natural resources management to these municipalities through several activities including:

- An assessment of the regulatory environment allowing a municipality to engage in financing and investment activities,
- Build public private partnerships and community private partnerships, to support profitable investments for the municipalities,
- Build capacities within each municipality to enable profitable engagements with the private sector, and hold networking events to maximize the potential benefit for each municipality as well as cooperating with other municipalities clusters/unions in adopting a well-designed financing mechanism and/or establishing a proper financing tool.

The detailed intervention includes the following tasks:

#### A. Assessment of Investment Environment

Identify historical limitations pertaining to the legal environment, especially focusing on the level of empowerment at the municipal level when it comes to investments.

Assessing potential solutions (of regulatory/legal nature but also in terms of capacity development and concrete actions) to overcome any limitations/obstacles, including but not limited to solutions that are possible during the life of the project.

Prepare a report capturing the findings and including recommendations for further action. The report will be provided both in Arabic and English language. A synthesis of the report will be provided in the form of power point slides, also in both Arabic and English languages. The report will build on existing findings and reports from phase I.

#### B. Identify Investment Opportunities

- Identify and assess investment opportunities including building project business plans for each opportunity complete with financial models and five-year projections. The investment opportunities should ideally originate from the SECAPs and include Nexus (integrated) projects.)
- Help the municipalities qualify investment opportunities from the list of projects in the pipeline.

#### C. Attracting Potential Investors

- Work with municipal leaders to identify and attract potential local and regional and international investors/funding structures
- Pitch qualified investment opportunities to interested investors (integrated projects from the SECAPs)
- Help municipalities negotiate project valuation and investment conditions with interested investors.
- Prepare a list of potential investors (financing mapping: local, national and international funding and financing structures) to be contacted and invited to events and presentations.

- Use this exercise to create a PPP/CPP model that can be used for future engagements with private sector investors.

#### D. Hold Networking and Events

- Hold one networking event for each country to present the results of the above activities/reports in a didactic manner so that the lessons learned and take-aways can be applied by the other municipalities who did not benefit from Tasks A-C), present available investment opportunities (including Nexus projects from the SECAPs) to identified financing and funding structures, and link stakeholders in what would be a repeating event hosted by the municipalities.

#### Duration of Assignment:

38 working days:

#### 2 days Desk review

#### 18 Days (6 days per country)

- 2 days - Preparations for public-finance dialogue workshop
- 1 day - Public-finance workshop for municipalities (one per each county)
- 1 day - Dialogue session with private sectors/investors/financiers and beneficiary groups and stakeholders (one per each country) \*

\* Disseminating results and lessons learned: The consultant will prepare captivating power point slides documenting the best practices and lessons learned from all of the above activities and present these at local and national level.

#### 15 Days (5 days per municipality)

5 days - SECAP advisory support: Identifying investment opportunity (Develop at least 1 project proposal for a WEF Nexus project per country (deriving from an action in SECAP per municipality x3)

#### 3 days Reporting

#### Geographical Scope

The consultant is expected to cover 8 municipalities through the following work modality:

COMPONENT	TARGETED MUNICIPALITY	COUNTRY
A, B, & C	<ul style="list-style-type: none"> <li>Al Karak Municipality</li> <li>Monastir Municipality</li> <li>Jdaidet El Chouf Municipality</li> </ul>	<ul style="list-style-type: none"> <li>Jordan</li> <li>Tunisia</li> <li>Lebanon</li> </ul>
D	<ul style="list-style-type: none"> <li>Al Karak Municipality</li> <li>Ma'an Municipality</li> <li>Ajlun Municipality</li> <li>Monastir Municipality</li> <li>Rowad Municipality</li> <li>Manouba Municipality</li> <li>Jdaidet El Chouf Municipality</li> <li>Semqaneyyeh Municipality</li> </ul>	<ul style="list-style-type: none"> <li>Jordan</li> <li>Tunisia</li> <li>Lebanon</li> </ul>



### Scope of Assignment

Activities	Deliverables
Assessment of investment environment	Report and synthesized power point presentation slides detailing findings and recommendations for successful implementation of access to finance for SECAP implementation and Nexus projects in each municipality according to local statutes and regulations.
Networking and events	Detailed lists of community leaders and potential investors in each municipality, and the successful implementation of one networking event in each municipality.
Identify Investment Opportunities	Using the list of potential investors in each municipality, identify and assess investment opportunities including building project business plans for each opportunity.
Attracting potential investors	Work with municipal leaders to identify and attract potential local and regional investors. Pitch qualified investment opportunities to interested investors. Help municipalities negotiate project valuation and investment conditions with interested investors.
Disseminating results	Present findings of initial report as well as lessons learned from all of the above activities/deliverables at (local, national) levels

Given the situation with Covid-19, innovative and flexible approaches/methodologies and methods for remote data collection should be suggested when appropriate and the risk of doing harm managed.

It is envisaged that the consultant will travel to 3 destinations (Lebanon, Tunisia, Jordan) to assess the investment environment in three targeted areas. Security implications of visiting some locations will be taken into consideration prior travel time, if travel restrictions due to Covid-19 in the region have been lifted by then. It is expected that the consultant suggests a back-up plan in the tender, and discusses potential effects on the evaluation (process and results).

The consultant should facilitate the entire work process with careful consideration of how everything that is done will affect the application of SECAP and WEF Nexus approach. It is, therefore, expected that the consultant, in the tender, presents i) how the municipalities are to participate in and contribute to the Access to Finance process and ii) methodology and methods for creating space for reflection, discussion and learning among the administration officials in the municipalities.

### Bidding

#### Eligibility Requirements:

Candidates must meet the following eligibility requirements:

- More than 5 years of experience in local governance financing and investments (public investments), business development (developing business models)
- Proven experience and network of financing structures in two of the three countries of

- implementation (Jordan, Tunisia, Lebanon)
- Fluent Arabic and English in writing and orally
  - Project and field type experience
  - More than 5 years of experience.
  - Experience in legal matters related to local government

### 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 Experience/References, 4) Financial Proposal.

Offers will be evaluated based on the following:

Narrative and Proposal	35%
Key Personnel	15%
Past Experience/References	20%
Cost	30%

### Deadlines

Date of Announcement	13 April, 2022
Deadline of Proposal Submission	5 May, 2022
Date of Evaluation	8 May, 2022
Date of Awarding	10 May, 2022
Date of Final Approved Submission of Assignment	25 December, 2022
Final date of implementation	30 December, 2022

### Important Notes:

- Corporate applications must be received from a good standing registered company in Jordan and/or Lebanon and/or Tunisia.
- One party implementing the Access to Finance in all three Project countries / municipalities is preferred and will be given a priority should it score comparably. However, a bidder may choose to apply for two country(ies) / municipality(ies) and their application will be accepted and duly reviewed.
- 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.
- 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.
  - 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.
- E. The proposal must be submitted in English. The technical proposal must not exceed 15 pages.
- F. Detailed presentations (one for each municipality) must be conducted by the consultant to the project team upon awarding and upon completion of activities A-C.
- G. 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).
- H. All reports and submissions must be provided in both English & Arabic. This includes presentations where necessary.
- I. 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.
- J. The successful candidate will be responsible for completing the assigned tasks referred to in A, B, C, & D, 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.
- K. Comprehensive law/regulatory, 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 information is available.
- L. The price provided must be in JOD and must be fully inclusive.
- M. The bidder will provide the price for travel & accommodation separately in a travel budget, and will provide a travel plan.

#### **Submission of the proposal**

The maximum budget amount available for this assignment is **11,400JOD**

The contact person at RSS/NERC is Rula Al-Shaweesh, MINARET Project Manager. The contact person should be consulted in case of any question, or if any problems arise during the evaluation process via email: [rola.shaweesh@rss.jo](mailto:rola.shaweesh@rss.jo)

The proposals for this evaluation will include two submissions; as electronic files (in Pdf format) with a heading "**Expert - Access to Finance at Municipal Level**" as follows:



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i. A technical proposal, containing;

- The understanding of the ToR, the main goals and tasks of this evaluation and of, the proposed methodology, team, detailed timetable, and steps for the assignment.
- The CV of the proposed evaluators (education background, expertise and experience in relation with the scope of the assignment and the geographical location); with a description of why experience is relevant to the task and using a matrix indicate how the proposed team complements each other as well as how they correspond to the profile.
- The proposed structure of the final report.

ii. A financial proposal for the provision of the services.

All proposals must be submitted to the following address: [Rss.procurement@rss.jo](mailto:Rss.procurement@rss.jo) not later than 28 April 2022, 16:00hrs Amman Time.

**“MINARET II project believes in equal opportunities and follow competent selection procedures to ensure equality of opportunity in all of its assignments”**



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