

## Annex I: Terms of Reference

### 1 BACKGROUND

#### 1.1. Context

In Turkey, 47% of net electricity consumption is from the industrial sector<sup>1</sup>, with an estimated 70% of this energy consumption from electric motor-driven systems (EMDS), 90% of which use 3-phase squirrel cage asynchronous motors as defined in the EU Eco-design Implementing Measure 640/2009 on electric motors as amended by Implementing Measure 4/2014<sup>2</sup>. Electric motors in Turkey, in general, are not energy efficient. The project aims to promote significant additional investment in industrial energy efficiency in Turkey by transforming the market for energy efficient motors used in small and medium sized enterprises. This objective will be achieved by strengthening the legislative and regulatory framework related to both new and existing EE motors in Turkey, developing appropriate governance and information infrastructure, upgrading test laboratories at the Turkish Standards Institute (TSI), launching a “one-stop shop” sustainable financial support mechanism (FSM), and developing and implementing a comprehensive public awareness and training programme.

The project is divided into five components focusing on:

- Component 1: Strengthened legislative and regulatory and policy framework for EE motors in Turkey.
- Component 2: Capacity building for relevant stakeholders to promote the benefits of EE motors.
- Component 3: Upgraded Turkish Standards Institute (TSI) test laboratory and strengthened monitoring, verification and enforcement.
- Component 4: One-stop-shop for financial support mechanisms.
- Component 5: Knowledge management and M&E

The most critical success factor for the EE Motors Project will be the successful implementation of the demo and scaled-up electric motor replacement programmes in Small and Medium Sized Enterprises (SMEs) in Turkey to accelerate market transformation towards more efficient electric motors used in SMEs in Turkey. The proposed motor replacement programmes will be implemented by using a one-stop-shop financial mechanism(s) to be developed under the Project. For this purpose, the level of subscription by SMEs to the one-stop-shop financial mechanism(s) will be key to achievement of this objective. Past experience with implementing similar financial support mechanisms proved to be not successful because of – among others – lack of awareness of SMEs on benefits of energy efficient electric motors and their unwillingness to get engaged in financial mechanisms. Therefore, the key messages as well as design, concept and style of implementation of awareness raising campaigns towards SMEs will be of utmost importance in shifting the level of engagement of SMEs in these motor replacement programmes using one-stop-shop financial mechanism(s) to be developed under the Project.

In line with the project activities, the subject consultant to perform the following duties is needed and hence this PN and TOR are announced:

- Developing a public relations and nationwide public awareness raising strategy for attracting the SMEs to motor replacement programmes and

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<sup>1</sup> TEDC (TEDAS), Electricity Distribution and Consumption Statistics of Turkey, 2015

<sup>2</sup> These are defined in Communiqué on Eco-Design Requirements for Electric Motors (OG No. 28197 of 7 February 2012)

- Leading role in designing the concept and contents of promotion materials and interactive result-oriented vis-à-vis meetings and events to successfully deliver the key messages to SMEs..

## 1.2. Institutional Setup

The Project is implemented by UNDP, in this context, the Directorate General (DG) for Productivity (DGP) under the Ministry of Science, Industry and Technology (MoSIT) serves as the implementing partner of UNDP. The National Project Director (NPD) of the Project is a high-level official of the DGP. In addition to this UNDP established a Project Management Unit (PMU) which is headed by the Project Manager and comprised of Project Manager and Project Associate and supported by a Chief Technical Advisor (CTA).

## 2 OBJECTIVE AND SCOPE

The objective of the assignment is to correctly guide the awareness raising activities under the project towards Small and Medium Sized Enterprises to ensure their engagement in motor replacement programmes using one-stop-shop financial mechanisms to accelerate market transformation towards more efficient electric motors in SMEs. The assignment will cover development of the project website, design of the national awareness raising programme, development of awareness raising and training documents and toolkits and delivery of a set of workshops, all highlighting the overall objective and expected results of the Project and key messages to the target audience.

## 3 DUTIES AND RESPONSIBILITIES OF THE INDIVIDUAL CONSULTANT

UNDP will mobilize an individual consultant as *Local Awareness Raising Consultant (LARC)* on a framework contract basis. The following duties and responsibilities of LARC are *indicative* and *subject to further detailing* through specific service requests to be made by UNDP during the course of the contract duration.

Within the scope of the Assignment; based on his/her expertise, the *LARC* is expected to provide consultancy services within the scope of the frame defined below, in specific service requests which will elaborate the task required from the Consultant and the due dates of these deliverables.

Below are the project outputs/activities that are relevant to this assignment:

Outputs	Activities	Remarks/Specific Activities
<b>COMPONENT 1: Strengthened legislative and regulatory framework related to new and existing EE motors</b>		
1.2: Supportive policies for EE electric motors that are harmonized with international best practices	1.2.1. Design and implementation of a recycling program for phased out energy inefficient motors in close collaboration with MoEU.	For the design of a recycling programme, a set of stakeholder workshops will be held. For these workshops the LARC is expected to develop an awareness raising strategy for attracting the SMEs to motor replacement programmes by producing key messages to highlight benefits of EE motors. For this purpose, the LARC will support the Project working with PMU, CTA and International WEEE Consultant (IWE) in the following specific activities by

		<p>developing the associated awareness raising strategy and producing key messages:</p> <ul style="list-style-type: none"> <li>- Prepare the content and the methodology for the workshop event in order to maintain the design factors (i.e. barriers, mitigations, etc.) and parameters through successful implementation of a recycling program for phased out energy inefficient motors;</li> <li>- Conducting and coordination of the workshop;</li> <li>- Designing recycling programme for old and inefficient motors.</li> </ul>
<b>COMPONENT 2: Improved capacity of relevant stakeholders to promote the benefits of EE motors</b>		
2.2: Technical training workshops on designing and implementing EE motor replacement programmes	2.2.1. Identification of stakeholder groups during Year 1 involved with EE motor replacement programmes and an assessment of their absorptive capacities for training on EE motor replacement programmes	<p>In cooperation with the PMU, CTA, and the Team of Consultants for Energy Audits, the LARC will provide necessary support to:</p> <ul style="list-style-type: none"> <li>- Identification of stakeholder groups involved with EE motor replacement programmes;</li> <li>- Designing the methodology (interviews, questionnaire, cold data collection, etc.) for the assessment of relevant stakeholders' absorptive capacities for training on EE motor replacement programmes;</li> <li>- Conducting the assessment process of relevant stakeholders' absorptive capacities for training on EE motor replacement programmes;</li> <li>- Preparation and submission of the Stakeholder Assessment Report to PMU.</li> </ul> <p>This support will also include producing striking and attractive messages to target audience (e.g. SMEs and EMUs) to ensure maximum participation in these events.</p>
	2.2.2. 20 technical training workshops (WSs) on EE motor replacements in the industrial sector and other sectors in Turkish society for SMEs	<p>This support will include producing striking and attractive messages to target audience (e.g. SMEs and EMUs) in cooperation with UNDP Communications Administrator to ensure maximum participation in these events.</p>
<b>COMPONENT 4: One-stop shop to improve industrial SME access to financing for EE motor investments</b>		
Output 4.1: Completed efficient motor assessed potential (EMAP)	4.1.1. Organize informative and promotion meetings (10 meetings) as formal discussions with the	The LARC is expected to take a leading role in designing the contents of these promotion

	selected chambers of industry to select the 3 OIZs who will possibly undertake the pilot activities for the EMAP, and other activities leading to the piloting of the one-stop-shop financial support mechanism	<p>meetings to successfully deliver the key messages to SMEs. Therefore, the LARC will work in close cooperation with PMU, CTA and other relevant consultants of the Project in the following key activities:</p> <ul style="list-style-type: none"> <li>- Preparation of the selection criteria (questionnaire) and preparation of the methodology, content and result oriented design (increasing encouragement) of the meeting events referring to the layout/algorithm of the "software tool" and EMAP approach with OIZs and their EMUs;</li> <li>- Sharing the questionnaire, phone call and e-mail discussions/ negotiations with relevant OIZs (contact specifically each of 60 OIZs who have already declared about their formal EMU allocations) and with their individual EMUs who will possibly undertake the pilot activities for the EMAP, and other activities leading to the piloting of the one-stop-shop financial support mechanism to organise meeting events;</li> <li>- Select 10 relevant OIZs as shortlisted with EMUs to organise meeting events with them;</li> <li>- Organize an agenda illustrating full picture of meeting programme with 10 "selected" OIZs &amp; EMUs;</li> <li>- Conduct the meetings with 10 selected OIZs (with their EMUs as requested) and maintain the core inlet information from the field to design and to drive the best actual matching software tool configuration / algorithm.</li> </ul>
<b>COMPONENT 5: Availability of EE motor information raising stakeholder awareness on EE motor benefit</b>		
Output 5.2: Nationwide public awareness raising campaign for EE motors.	The Consultant is expected to develop a public relations and nationwide public awareness raising strategy in collaboration with the Communications Administrator of UNDP and Executing Agency under the coordination of PMU. This strategy will be considered in designing and implementing all awareness raising materials, activities as well as communications components of all collective activities under the Project.	
	5.2.2. Two short movie (3-5 min) spots will be developed and delivered on a weekly basis on	The LARC will develop the contents of these movies in collaboration with the

	radio and TV for the entire duration of the Project	Communications Administrator of UNDP and Executing Agency under the coordination of PMU.
	5.2.3. Development of best practice and case studies brochures / flyers and advertisements (digital / hard copy) on the benefits of EE motors and the one-stop shop mechanism that will be displayed on billboards in selected OIZs, posters, and other print, social media and Internet.	The LARC will develop the contents of these case studies as well as design and contents of promotion materials listed considering the outcomes of and lessons learned from the demo motor replacement programmes in collaboration with the Communications Administrator of UNDP and Executing Agency under the coordination of PMU.
	5.2.4. Development of specific EE motor awareness raising messaging materials (printed / audio / visual / web based / social media) towards other OIZs that can be disseminated to OIZs during the scale up phase (Output 4.4) of the one-stop shop during Year 3. This activity is important and should have the effect of boosting confidence of other OIZs to adopt the one-stop shop mechanism piloted in Output 4.3	The LARC will develop the contents of these messaging materials including production of messages, development of contents audio-visual materials and comments in collaboration with the Communications Administrator of UNDP and Executing Agency under the coordination of PMU to finalize the production.

If required by UNDP, the IC may be requested to provide additional consultancy services on topics related to her/his expertise area, which are not indicated above, since the table provides a general table to define the scope of the services. The detailed tasks will be provided in specific service requests.

#### **4 INSTITUTIONAL ARRANGEMENTS**

UNDP will provide all relevant background documents. UNDP is not required to provide any physical facility for the work of the IC. However, depending to the availability of physical facilities (e.g. working space, computer, printer, telephone lines, internet connection etc.) and at the discretion of the UNDP in consultation with relevant stakeholders such facilities may be provided at the disposal of the IC. UNDP will facilitate meetings between the ICs and other stakeholders, when needed.

The Individual Consultant will report to the PIMS 5285: UNDP/GEF Promoting Energy Efficient Motors in Small and Medium Sized Enterprises (EE Motors) Project Manager.

After submission of the deliverables listed in Section 5, UNDP may have some comments and revision requests on the deliverables. The Consultant shall address the comments of UNDP and shall revise the deliverables as per the comments within at most 10 calendar days following notification of comments by UNDP to the consultant.

#### **5 DELIVERABLES**

The Assignments will include interim and final deliverables, which will be defined in the specific service requests to be made by UNDP to the IC within the scope of Terms of Reference.

All reports should be submitted in English and/or Turkish as required.

## **6 ESTIMATED INPUTS BY THE INDIVIDUAL CONSULTANT (IC)**

IC is expected to invest (at maximum) 120 man/days over 24 months throughout the contract validity.

The IC shall produce deliverables to be indicated in the Service Requests to the satisfaction of the UNDP and project partners within the man/days limits set forth in the Service Request. In cases where the IC may need to invest additional man/days to perform the tasks and produce the deliverables listed and defined in the mutually agreed (signed) Service Request, the IC shall do so without any additional payment.

## **7 REQUIREMENTS FOR EXPERIENCE AND QUALIFICATIONS**

### **General Qualifications:**

- At least a Bachelor's Degree in the fields of communications, graphic design, marketing, business administration, engineering or relevant field. Master's degree in business administration (MBA) will be an **asset**.
- Full proficiency in English and Turkish
- Computer proficiency in MS Office (Word, Excel and Power Point) is prerequisite.

### **Professional Experience:**

- Minimum of ten years of relevant professional working experience. More than fifteen years of professional working experience will be an **asset**.

### **Specific Experience:**

- At least five years of professional experience in designing and implementation of public relations or marketing or awareness raising campaigns and other related activities;
- Minimum three years of experience in public relations or marketing activities in the field of product and service marketing with the scope of industrial sectors. Experience in energy efficiency sector aiming at SMEs will be an **asset**.
- Experience in designing and implementing public awareness raising and marketing campaigns under energy efficiency in SMEs will be an **asset**.
- Experience in Need Analysis or PR and awareness raising strategy development in the field of energy efficiency or energy market aiming at SMEs and/or OIZs in at least one Project (national or international) will be an **asset**.
- Experience in preparation of communication materials based on industrial market segmentation will be an **asset**.

## **8 TIMING AND DURATION**

The Assignment is expected to be start within May 2018 and be completed by the end of April 2020.

## **9 PLACE OF WORK**

Place of work for the assignment is home-based and Ankara. It may be required that the Consultant travels out of the duty station within the scope of this Terms of Reference. In case, travel out of the duty station is needed, the travel and accommodation costs of these missions will be borne by UNDP. The costs of these missions may either be;

- Arranged and covered by UNDP CO from the respective project budget without making any reimbursements to the consultant (Any assignment-related travel (economy class), accommodation (bed & breakfast) outside duty station will be arranged by the travel agency UNDP works with, when necessary, by receiving prior approval of UNDP) or
- Reimbursed to the consultant upon the submission of the receipts/invoices of the expenses by the consultant and approval of the UNDP. The reimbursement of each cost item is subject to the following constraints/conditions provided in below table;
- Covered by the combination of both options.

Cost item	Constraints	Conditions of Reimbursement
Travel (intercity transportation)	full-fare economy class tickets	1- Approval by UNDP of the cost items before the initiation of travel 2- Submission of the invoices/receipts, etc. by the consultant with the UNDP's F-10 Form 3- Acceptance and Approval by UNDP of the invoices and F-10 Form.
Accommodation	Up to 50% of the effective DSA rate of UNDP for the respective location	
Breakfast	Up to 6% of the effective DSA rate of UNDP for the respective location	
Lunch	Up to 12% of the effective DSA rate of UNDP for the respective location	
Dinner	Up to 12% of the effective DSA rate of UNDP for the respective location	
Other Expenses (intra city transportations, transfer cost from /to terminals, etc.)	Up to 20% of effective DSA rate of UNDP for the respective location	

## 10 PAYMENTS

The contract to be signed between UNDP and successful candidate will not entail a financial commitment from UNDP. UNDP's financial commitment will be established on an ad-hoc basis every time as services are officially requested by UNDP. Service Requests will be detailed and signed by both parties for a Service Request to be effective.

Payment terms and conditions will be specified in the specific service requests. Payment terms and conditions along with the daily fee rate (indicated in the contract) and number of man/days invested (not to exceed maximum number of days in the service request) will be the basis of payment to the IC. Payments will be made against submission of the deliverable(s) in the specific service requests by the IC and approval of such deliverables by UNDP.

Payments will be made within 30 days upon acceptance and approval of the corresponding deliverable by UNDP on the basis of actual number of days invested in that respective deliverable indicated in the Service Request and the pertaining Certification of Payment document signed by the expert and approved by the responsible Project Manager. The total amount of payment to be effected to the Consultant within a service request cannot exceed the number of man/days indicated in the specific service request and the total amount of payment to the Consultant within scope of this contract cannot exceed equivalent of **120 days**.

The expert shall be paid in US\$ if he/she resides in a country different than Turkey. If he/she resides in Turkey, the payment shall be realized in TRY through conversion of the US\$ amount by the official UN exchange rate valid on the date of money transfer.

If the deliverables are not produced and delivered by the consultant to the satisfaction of UNDP as approved by the responsible Project Manager, no payment will be made even if the consultant has invested man/days to produce and deliver such deliverables.

The amount paid to the consultant shall be gross and inclusive of all associated costs such as social security, pension and income tax etc.

Tax Obligations: The IC is solely responsible for all taxation or other assessments on any income derived from UNDP. UNDP will not make any withholding from payments for the purposes of income tax. UNDP is exempt from any liabilities regarding taxation and will not reimburse any such taxation to the IC.