

TERMS OF REFERENCE

Assignment Information	
Job Title:	Consultant to Conduct SDG Investor Map for the Philippines (National Consultant)
Country Office:	UNDP Philippines
Duty Station:	Manila, Philippines (Home-based)
Type of Contract:	Individual Contractor (IC)
Contract Duration:	30 August 2022 – 30 March 2023

Project Description
<p>At a time of unprecedented global challenges, sustainable finance is a driving force for social and economic resilience. Public and private finance are essential for recovery from the COVID-19 pandemic, and from the wide-ranging effects on the achievements of the SDGs. Rallying private sector participation and strengthening private and public sector networks for achieving sustainable and inclusive economic growth take on new urgency. National resource mobilization and increased commitments from private investors and enterprises will be needed for recovery, while maintaining progress towards the achievement of the Sustainable Development Goals (SDGs) by 2030. To achieve transformational changes in health, climate, environment, education, agriculture, gender equality, and the eradication of poverty in all its forms, greater private sector engagement and investments are critically needed.</p> <p>As the UN's global development network, the United Nations Development Programme (UNDP) is advocating for change and connecting countries to knowledge, experience, and resources to help people build a better life. UNDP's SDG Impact initiative seeks to catalyse financial investments from the private sector that advance the SDGs. As interest grows among private sector actors to align investment activity with the SDGs, there is a demonstrated need for unifying standards, tools, and services that can be relied upon by investors to support a process of targeting, measuring, and achieving development outcomes.</p> <p>SDG Investor Maps are market intelligence tools that help the private sector identify investment themes in emerging markets which have significant potential to advance the SDGs that are aligned to government policies and sustainable national development needs. It seeks to address the need for more private capital to be channelled to the developing market, and for the funding to contribute to the SDGs. Private sector investors who are looking for SDG investments can use the SDG Investor Maps to explore investment themes in the knowledge that they are aligned to the identified SDG needs in country and the governments' development priorities - thereby strengthening the potential for deep sustainable development.</p> <p>SDG Investor Maps are created using an established <u>8-step</u> methodology that combines secondary data research (on existing development needs using the SDG framework, policy priorities, and market opportunities) with interviews/discussions with public and private sector stakeholders to verify findings and contribute new insights. The data are analysed to distil Investment Opportunity Areas (IOAs) and data-backed business models, mapped across 20+</p>

data points. The findings of the Investor Maps are synthesized in an Excel template and uploaded into a dynamic online platform (upcoming late 2020) where investors can search for the market intelligence on investment opportunities by various functionalities.

In the Philippines, the SDG Investor Map may complement the COVID-19 Rapid Assessment activities that are planned to be undertaken. Its goal is to gather and analyse new data on 1) changes in private sector strategies, and 2) on emerging SDG-related priorities in the context of COVID-19, to rapidly identify business models and Investment Opportunity Areas that can respond to the COVID-19 crisis. It is based on an online survey directed to the private sector, in-depth private sector interviews, and desk research of emerging COVID-19 impact assessments (e.g., UNDP socio-economic assessments).

Over the years, the UNDP Philippines have been working closely with the private sector to leverage additional resources for the SDGs through private sector financing. Among these initiatives are the following:

Transformational Business

In 2016, the UNDP, in partnership with the Philippine Business for the Environment, launched the SDGs online portal where companies provided data and other information on their initiatives that contribute to the SDGs. This led to the release of the first Transformational Business Report released in November 2017 which highlights how businesses are aligning their core business processes, activities, and initiatives with the SDGs. Based on the report, a total of Php 40.7 billion have already been invested in SDG-aligned core business practices and programs in the country. The challenge for the private sector is to move away from thinking and operating in silos, towards a truly inclusive and sustainable approach to doing business.

Inclusive Business

Alongside the Transformational Business Report, the UNDP, in partnership with the Philippine Business for Social Progress, also published a report in 2017 entitled: *New Horizons: How Inclusive Business is Helping Achieve the SDGs in the Philippines*, which aims to demonstrate how the private sector can be engaged in the country to contribute to achieving national development priorities and the SDGs, and at the same time, show how governments and other stakeholders can create an environment in which such business models thrive and reach scale. The report emphasised that the concept of Inclusive Business demonstrates strong potential for contributing to the SDGs as companies adopting Inclusive Business models are providing sustainable income opportunities and more affordable goods and services for people. As such, one of the key recommendations was to increase awareness and ensure greater engagement of Inclusive Business practitioners in policy and programme development. The SDG Investor Mapping exercise can be one concrete way of achieving that.

Better Business Better World: Philippines

Following this up, in 2019, the UNDP in the Philippines also produced the Better Business, Better World: Philippines Report which details the most significant business opportunities aligned with the SDGs in four key areas of the Philippine economy, namely: cities and mobility; energy and materials; food and agriculture; and health and well-being. The report highlighted that through the shift to sustainable business models, an economic prize worth more than

US\$82 billion across the country, alongside large environmental and social benefits can be achieved by 2030. The way forward is to drive commitment and pursue concrete actions towards that goal.

BioFin

As one of the 17 megadiverse countries in the world, the Philippines produced the Philippine Biodiversity Strategy and Action Plan (PBSAP) 2015-2028 which provides the measures in conserving its key biodiversity areas. To implement the Plan, a total of PhP 24-B (USD 530 million) annually has been identified as its financing requirement. With the current level of spending on biodiversity which is at PhP 5B (USD 110 million) per year, there is a financing gap of around 80%. BIOFIN was initiated by the UNDP to identify, access, combine and sequence various sources of biodiversity funding to meet national needs and targets. At present, the Philippines is implementing several finance solutions involving the national agencies, local government units, the private sector, civil society organizations, and the citizenry to implement the PBSAP.

Climate Finance

There are two climate finance projects that will be implemented by the Country Office. These are the Accelerating Green and Climate Finance in the Philippines: Nature Based Solutions or the Climate Finance PH for NBS and the Climate Finance Network or CFN. Specifically, the Climate Finance PH for NBS aims to increase private sector investments into gender responsive nature-based solutions for climate resilient technologies, innovations, practices and approaches.

This Project will demonstrate how these additional investments can generate solid financial returns and contribute to the achievement of other SDG goals such as gender equality, expanding access to clean water, job creation, increase in incomes of local communities, increased food production, increased sustainable consumption and production and enhanced natural resilience, among others. The CFN, on the other hand, will work across on six inter-related workstreams which are based on our climate change finance programming experience over the past five years and lessons learnt during the inception phase of the CFN: 1) Climate change aligned budgeting and planning; 2) Direct access to international climate change finance; 3) Tax and use of innovative climate change financing instruments; 4) Gender and social inclusion and climate change finance; and 5) Transparency and accountability of climate change finance; and 6) Modelling climate change impacts on economic growth, sectors and consideration of distributional impacts. Across the mentioned six workstreams, the project will aim to achieve the following outputs, factoring in the importance of realizing positive impacts for gender equality, poverty and human rights in all of the workstreams.

JP INFF

Currently, the Philippines is implementing the Joint SDG Fund Joint Programme *on Reaping the Demographic Dividend and Managing the Socio-Economic Impact of COVID-19 by Applying an Integrated National Financing Framework in the Philippines* (JP INFF and DD) that aims to apply the building blocks of the Integrated National Financing Framework (INFF) to provide catalytic support – tools, technical assistance for strengthening systems, coordination, and consensus building on priorities as part of a whole of government approach in support of We Recover As

One. It will strengthen national planning and budgeting mechanisms to ensure that a more effective resource allocation and establish a more diversified financing framework that can leverage additional resources for the implementation of COVID-19 recovery strategies, and ultimately, the achievement of the SDGs in an integrated manner.

Part of the JP INFF work is the updating of the country's Development Finance Assessment, following its first report published in 2014¹, and a snapshot released in 2017², which aims to provide an overview of the financing landscape in the Philippines and identify where resources are available to support the attainment of the SDGs, especially given the impact of COVID-19. Based on the 2017 report, domestic private investment measured according to fixed capital formation has more than doubled since 2000 to 2015 (\$18.1B to \$51.6B), and the role of stable and liquid financial markets as well as of microfinance in contributing to the national development agenda has been highlighted.

The development of SDG Investor Maps will strongly support the implementation of INFF in the Philippines, as it aims to bring together the full range of financing sources – public finance and tax, aid, borrowing, and private investments, to align resource flows and policies to support national development strategies or plans, and lay out a strategy to increase investment, manage risks, and achieve sustainable development.

Scope of Work and Deliverables

The IC is expected to conduct the research and synthesis of the SDG Investor Map according to the 8-step methodology. In doing so, the IC shall:

- Contribute to identifying key documents and data sources
- Contribute to identifying key stakeholders from the public and private sector that will have a material impact on the course of the SDG Investor Map development process
- Organize and conduct interviews with public and private sector to verify outputs at key stages of the 8-step process
- Provide support to UNDP in identifying IOAs through co-organizing and co-leading the workshops required at different stages of the 8-step process.

The IC shall produce the following outputs based on the methodology handbook provided by UNDP:

- **Output 1: Workplan and relevant materials.** The IC shall prepare a detailed plan to effectively implement the assignment covering timelines, data collection approach, and tools to be used, among others. The work plan shall also include the interview guides and presentation materials.
- **Output 2: Research Report containing findings after steps 2, 4, and 6.** After data collection activities, the IC shall prepare a concise presentation material which synthesises the initial

¹ [Copy of 2014 Philippines DFA Report](#)

² [Copy of 2017 Philippines DFA Snapshot](#)

findings from the analysis of national priority sectors (step 2), subsector priorities (step 4), and priority subregions (step 6). These outputs should be validated through relevant consultations with rationale provided for the selection of sectors, sub-sectors and regions as well as for those that did not make it to the final list.

- **Output 3: Final, shortlisted Investment Opportunity Areas [IOAs]** with detailed rationale for selection of IOAs based on criteria mentioned in the methodology handbook as well as any other specific criteria added for its relevance to the Philippines context. This report should also include the list of IOAs that face policy or regulatory challenges creating entry level barriers for the private sector to participate meaningfully. Such IOAs are referenced as ‘white spaces’.
- **Output 4: Final filled in excel template [to be provided by UNDP] and a short, visual report containing the completed SDG Investor Map with validated IOAs, white spaces and other relevant data points.**

The Individual Contractor is expected to accomplish the following activities with corresponding deliverables:

Deliverables/ Outputs	Duration to Complete	Target Due Dates	Review and Approvals Required
Output 1: Work Plan and Relevant Materials	10 days	30 August 2022	UNDP Philippines through Team Leader for Institutions and Partnerships Programme SDG Impact Specialist, APAC
Output 2: Research Report containing findings after steps 2, 4, and 6	20 days	30 September 2022	UNDP Philippines through Team Leader for Institutions and Partnerships Programme SDG Impact Specialist, APAC
Output 3: Final, shortlisted Investment Opportunity Areas [IOAs]	20 days	31 December 2022	UNDP Philippines through Team Leader for Institutions and Partnerships Programme SDG Impact Specialist, APAC
Output 4: Final filled in excel template [to be provided by UNDP] and a short, visual report containing the completed SDG Investor Map with validated IOAs	40 days	10 March 2023	UNDP Philippines through Team Leader for Institutions and Partnerships Programme SDG Impact Specialist, APAC

Institutional Arrangements

Under the overall guidance of the Team Leader of the Institutions and Partnerships Programme, UNDP Philippines, the Consultant will be under the direct supervision of the JP

INFF Coordinator with whom all outputs shall be submitted and through whom all communications shall be coursed or copied.

A communication protocol requiring regular check-ins for technical support, advisory on methodology and sharing of best practices from other countries/regions will be mutually discussed and finalized once the IC is onboarded.

UNDP Philippines will not provide a workstation, administrative support, transportation, or ICT equipment for the consultant. The consultant is expected to have his/her own equipment, office space, and internet connectivity.

Duration of Assignment, Duty Station and Travel

Duration: The consultant will be engaged for 90 **working days spread across the period of 30 August 2022 to 30 March 2023** unless revised in a mutually agreed upon timetable by UNDP and the Contractor. Changes in the duration of the contract will be implemented through issuance of a contract amendment.

Duty Station: Manila, home-based.

In light of the COVID-19 pandemic and declaration of State of Public Health Emergency in the Philippines, all work and travel of the Individual Consultant shall be done within the guidelines and protocols set by the local and national government. Field work, trainings, meetings, and coordination shall be done in compliance with prevailing health protocols in the country.

Qualifications and Competencies

Qualifications

- At least Master's degree in finance, economics, or other relevant fields;
- Minimum of seven (7) years of experience in the field of financing and sustainable development, including public and private sector financing, , economics, or other relevant fields;
- At least five (5) years of experience in working with governments and multi-stakeholders in similar countrylevel work rooted in public policy reforms; and
- At least five (5) years of experience in leading consultations and facilitating dialogues among senior governmentofficials and other senior stakeholders.

Language requirement: Fluency in English (written and spoken), and an ability to summarize and present information effectively

Competencies

- Strong interpersonal and communication skills;
- Strong analytical, reporting and writing abilities skills;
- Openness to change and ability to receive/⁶integrate feedback;

- Ability to plan, organize, implement and report on work;
- Ability to work under pressure and tight deadlines;
- Proficiency in the use of office IT applications and internet in conducting research;
- Outstanding communication, project management and organizational skills;
- Excellent presentation and facilitation skills.
- Demonstrates integrity and ethical standards;
- Positive, constructive attitude to work;
- Displays cultural, gender, religion, race, nationality and age sensitivity and adaptability.

Scope of Price Proposal and Schedule of Payments

1. The Contractor should send the financial proposal based on a lump-sum amount for the delivery of the outputs identified below. The total amount quoted shall be **"all inclusive"** (**professional daily fees X number of days, communications, etc.**) that could possibly be incurred by the Contractor should be factored into the final amount submitted in the proposal. Travel, as deemed relevant by UNDP and compliant with government guidelines on community quarantine, will be arranged and paid for by UNDP and should not be included in the financial proposal.
2. **Medical/health insurance must be purchased by the individual at his/her own expense, and upon award of contract, the Contractor must be ready to submit proof of insurance valid during contract duration**
3. The contract price will be fixed **output-based price**. Any deviations from the output and timeline will be agreed upon between the Contractor and UNDP.
4. Payments will be done upon satisfactory completion of the delivery by target due dates. Outputs will be certified by the JP INFF Coordinator prior to release of payments.

	DELIVERABLE	Target Due Dates	PERCENT OF FEE
1	Output 1: Work Plan and Relevant Materials	30 August 2022	20%
2	Output 2: Research Report containing findings after steps 2, 4, and 6	30 September 2022	20%
3	Output 3: Final, shortlisted Investment Opportunity Areas [IOAs]	31 December 2022	25%
4	Output 4: Final filled in excel template [to be provided by UNDP] and a short, visual report containing the completed SDG Investor Map with validated IOAs	10 March 2023	35%
	TOTAL	-	100%

Application Procedure

The following documents may be requested:

1. Duly accomplished **Letter of Confirmation of Interest and Availability** using the template provided by UNDP
2. **UNDP Personal History Form (P11) or Curriculum Vitae** (following the template attached) indicating all past experiences from similar projects or requirements, as well as

the contact details (email and telephone number) of the Candidate and at least three (3) professional references;

3. **At least 2 samples of relevant written work**, specifically on SDG financing, SDG budget tagging, public financial management, and/or public and private sector financing.
4. **Financial Proposal** that indicates the all-inclusive fixed total contract price, supported by a breakdown of costs, as per template provided. If an Offeror is employed by an organization/company/institution, and he/she expects his/her employer to charge a management fee in the process of releasing him/her to UNDP under Reimbursable Loan Agreement (RLA), the Offeror must indicate at this point, and ensure that all such costs are duly incorporated in the financial proposal submitted to UNDP.
5. Medical/health insurance must be purchased by the individual at his/her own expense, and upon award of contract, the consultant must be ready to submit proof of insurance valid during contract duration.

Criteria for Selection of Best Offer

The Offers received will be evaluated using a combined scoring method - where technical proposal will be weighted 70 points and combined with the price offer which will be weighted 30 points.

The **CV** will be reviewed using the criteria in the table below. ***Only offerors who will obtain a minimum of 70% or 49 out of 70 obtainable points will be shortlisted and considered for evaluation of financial proposal.***

Criteria	Max Points
<p>At least Master's degree in finance, public financial management, economics, or other relevant fields.</p> <p><i>11 points for master's degree; 15 for Ph D</i></p>	15
<p>Minimum of seven (7) years of experience in the financing and sustainable development (field of public and private finance, economics, or other relevant fields)</p> <p>Experience in government budget and planning systems is an advantage.</p> <p><i>18 points for 7 years, additional point for each additional year, additional 3 points for experience in government budget and planning systems</i></p>	25

	<p>At least five (5) years of experience working with governments and multi-stakeholders in similar country level work rooted in public policy reforms and proven ability to lead consultations and facilitate dialogue among senior government officials and other senior stakeholders.</p> <p>Experience in Integrated National Financing Framework (INFF) is an advantage.</p> <p><i>11 points for 5 years, additional points for each additional year, additional 2 points for experience in INFF</i></p>	15	
	<p>At least five (5) years of research and analytical experience in areas of public financing policy for sustainable development</p> <p><i>11 points for 5 years, additional point for each additional year</i></p>	15	
	<p>Proficiency in the English Language</p> <p><i>Indicate pass or fail mark based on sample written work submitted. A link of sample work can be indicated in the CV.</i></p>	Pass/Fail	
	TOTAL	70 points	