

**request for proposals.**

**Implementation of pilot ACTIVITIES SUPPORTING THE GOVERNANCE OF THE voluntary carbon market in colombia, Mexico, and peru**

*Publication Date* 10 September 2024

*Submission Deadline* 29 September 2024, 23:59 (UTC-5)

**BACKGROUND**

Gold Standard is a civil society NGO and a standards body that promotes the best that can be achieved in climate and development projects. It was established in 2003 by [WWF](http://wwf.panda.org/) and other international NGOs as a best practice standard to ensure that projects which reduce carbon emissions also deliver credible, high-integrity sustainable development benefits. In close collaboration with its network of partners (civil society, governments, and private sector), Gold Standard leads several global innovation programs and supports 2000+ climate and development projects in over 100 countries worldwide.

Gold Standard is implementing a multi-year project (2022-2026) funded by Environment and Climate Change Canada (ECCC), assisting countries in the Pacific Alliance (Colombia, Mexico, Chile[[1]](#footnote-2), and Peru) and Ecuador on the implementation of their Nationally Determined Contributions (NDCs), through dedicated support on issues related to monitoring, reporting, and verification (MRV). Through this project, Gold Standard provides support to the Pacific Alliance’s Sub-Group on MRV and Climate Change (SGT-MRV), responding to the priorities of member countries to develop capacity and systems to underpin climate action.

**CONTEXT**

Under the SGT-MRV, country delegates from Mexico, Peru, and Colombia have expressed interest in piloting activities related to the regulation of safeguards and the role of intermediaries for Voluntary Carbon Market (VCM) projects in their jurisdictions. The participating governments expressed an intent to undertake activities that can support the harmonisation of future actions related to the VCM in their jurisdictions.

In response to this request, Gold Standard facilitated, in the first quarter of 2024, a series of guided discussions with focal points, other experts within national governments and other stakeholders, to clarify and identify the objectives and priorities of Colombia, Mexico and Peru and to inform the development of a concept note for the implementation of the pilot on VCM Regulation. These discussions allowed country delegates to collectively define the scope, timeframe, costs, local expertise needs, and governance and ownership structure for the implementation of pilot activities over the following 1-2 years, to ensure that these are appropriately designed, relevant, impactful and represent value for money.

While Gold Standard will facilitate arrangements for implementation, we are seeking a local consultancy firm (based in **Colombia, Mexico, or Peru**) with subject matter expertise in the VCM, and in particular carbon market-related regulation. As described below, the consultancy firm will play a critical role in implementing the identified activities in the pilot concept note and ensuring all country needs are met.

**Overview and purpose of the assignment**

Gold Standard is seeking an implementing partner (hereinafter Service Provider) to develop a set of tools that will provide a common basis for individual countries to advance the implementation of their plans related to the voluntary carbon market and, in the process, help build a regional vision for these markets within the Pacific Alliance.

Colombia's primary interests include the implementation and guarantee of social and environmental safeguards within their inter-institutional architecture while working on new regulations. Meanwhile Mexico is interested in the implementation of their VCM regulation following its introduction, especially regarding the respect and promotion of safeguards and objectives related to fair pricing and equitable access to carbon markets. Peru shares the interests of both Colombia and Mexico with respect to safeguards and the need to ensure environmental integrity, transparency, and compliance with standards. They also have an interest in work related to the risk of double counting and accurate accounting, the need for involvement of other ministries, and the necessity of having mechanisms to identify carbon rights.

The intended purpose of this assignment is to provide recommendations to address the above challenges for each country while incorporating the following common needs identified by these three countries:

1. Need to ensure compliance with social and environmental safeguards, making sure that carbon market projects both contribute to the mitigation of greenhouse gas emissions and protect the rights of communities (ethnic, civil society, populations requiring special protection) located in the territories where mitigation projects are carried out, especially in the AFOLU sector. This will involve consideration of the alignment between national requirements and guidelines for safeguards and those implemented by crediting programmes.
2. The need to establish common minimum criteria related to participation, local and forest governance, transparency, environmental integrity, additionality, accounting, methodological consistency, monitoring, and oversight of voluntary carbon market activities. Additionally, considering how sovereign states can have and use authority to apply safeguards frameworks beyond traditional sectors, such as the AFOLU sector.
3. The need to provide legal clarity regarding ownership and carbon rights.
4. The need for capacity development in the public sector entities that have jurisdiction over the voluntary carbon market in each country, as well as the involvement of other national and subnational authorities that, although not traditionally engaged in climate change actions, may have influence on the development and implementation of voluntary carbon market activity.

As the implementing partner for ECCC’s support for Pacific Alliance countries, Gold Standard will oversee the delivery of work by the Service Provider, providing support as required and overseeing the timely and professional delivery of outputs. However, considering its role as a standard-setting organisation that certifies carbon credits used in the voluntary carbon market, Gold Standard will not seek to remove, amend, or otherwise influence any recommendations or other relevant material prepared by the Service Provider where this could represent a conflict of interest.

**Description of the assignment**

The Service Provider will have the flexibility to structure their work in the way that they consider most suitable to achieve the mandate and objectives of this assignment, within the allocated time (7 months) and budget (up to USD 90,000). Gold Standard envisages that the assignment will have five major outputs:

**Output 1:** A document that compiles and compares available information in Colombia, Peru, and Mexico on the following topics:

* Legal frameworks and/or regulation on social and environmental safeguards, considering aspects such as participation and consultation, criteria for assessing socio-environmental impacts, grievance management, and conflict resolution.
* Ownership and carbon rights.
* Calculation methodologies, including, among other aspects, baseline definitions, formulas, risk of reversal, mitigation activities, verification, and transparency.

For this document, the Service Provider should gather input from regulators in the governments participating in the pilot, defined as national entities responsible for issuing relevant standards, as well as other entities, including those from different branches of government, that have interests in the governance of the voluntary carbon market. Additionally, feedback from regulated actors, such as certification standards or programs, Validation and Verification Bodies, project developers, civil society, and (if possible) communities where projects are implemented, should be incorporated, among others identified as relevant.

**Output** **2**: Analysis and proposal for monitoring safeguards

The Service Provider should conduct interviews, workshops, support participatory sessions (led by national governments) with communities where projects are implemented and other market actors including local authorities, as well as other knowledge and experience exchange activities that enrich the pilot’s results.

These engagements, and other desk-based research and analysis by the Service Provider to understand global best practice and norms, should contribute to a written set of recommendations for the participating countries for the inclusion of social and environmental safeguarding requirements within any regulations and wider governance of the voluntary carbon market.

This written output should be tested with a selection of representative voluntary carbon market projects in each country, to understand its compatibility and the practicality of its implementation.

**Output 3:** Recommendations to support national efforts to regulate the voluntary carbon market.

The Service Provider should provide tailored regulatory proposals for each country, based on their specific needs and the progress of their regulation or guidelines. This should include:

* A detailed analysis of common minimum criteria for activities seeking certification and the issuance of carbon credits for sale in the voluntary carbon market, related to participation, governance, transparency, integrity, additionality, accounting, methodological consistency, and monitoring and control.
* A compilation and analysis of good practices identified in the governance of the voluntary carbon markets globally as well as good practices within standard-setters, informing guidance to ensure the integrity of these markets. This should include examples of good practice for the treatment and classification of carbon credits under regulatory frameworks and the protection of carbon credit rights.
* Consideration of the integration between the voluntary carbon market and Article 6 of the Paris Agreement, and how participating countries can work collaboratively towards this end, considering other activities that may be underway.
* Identification of needs and opportunities to strengthen the capacity of public and private sector actors, communities, and other market participants, both nationally and sub-nationally, with respect to the voluntary carbon market, to support effective governance and equitable access.

**Output 4:** Prototype project dashboard and recommendations for further development

The participating governments have expressed interest in access to a technological tool that compiling material information on projects within their jurisdiction, which can be used by government entities to support their review, monitoring, and analysis of carbon market activities. This tool would not be intended to replace national registries or similar instruments that are each country’s exclusive competence, but instead provide information to inform the governance of the VCM in participating countries.

The Service Provider will be responsible for developing two sub-outputs:

* An excel-based prototype of a carbon market activity tracking tool. This shall include data points agreed in collaboration with the participating governments, with an expectation that at a minimum it includes calculation methodologies, certified impact, benefit distribution, project location, mitigation potential and available certificates. This prototype shall be populated with information (to the extent available) from at least five projects in Mexico, Colombia, and Peru, with the selection of projects based on pre-defined criteria established by the participating governments. It shall also include a tab or separate document with guidance for its use.
* A short (up to 10 page) report providing options and recommendations for the further enhancement of the activity tracking tool. This should include (but not be limited to) consideration of: (a) how such a tool could align with national registries, where available; (b) the extent to which included information is readily available through existing external sources, including programme registries or other platforms; and (c) the potential cost and complexity of digitisation of the activity tracking tool, including its maintenance and integration with other information systems/registries including UNFCCC registries.

The development of these sub-outputs should involve the participation of national authorities responsible for managing climate change information, as well as representatives of the communities residing in the territories where the projects are implemented. The Service Provider shall present the prototype and the options for future development in a workshop with country focal points.

This output must be finalised no later than the **end of February 2025.**

**Output 5:** A policy brief, of no more than 5 pages, that outlines the context, objectives, experience, results, and recommendations of the pilot for a general audience.

It is envisioned that the consultant may have to travel to participatory processes carried out by the national authorities (when permitted by them) with the communities living in the territories where the projects are being implemented.

The Service Provider will be expected to communicate virtually (via email, telephone, and video conference) with Gold Standard and any other individuals or organisations to provide regular progress updates. Whenever necessary, either party may request a meeting with the other.

The Service Provider is also expected to engage focal points or alternative representatives of other PA countries supported under this project (Chile and Ecuador) to build understanding and learn lessons from their experiences. The Service Provider may also request Gold Standard’s support to communicate with external organisations or individuals, although the Service Provider is generally expected to undertake such communication independently.

In cases where travel is necessary, the Service Provider will submit all travel related expenses to Gold Standard for re-imbursement in accordance with Gold Standard guidelines and the [ECCC’s travel directive](https://www.njc-cnm.gc.ca/directive/app_d.php?lang=eng).

**Timeline**

The approximate timeline for preparation of the required outputs is estimated at 7 months as of the contract start date (indicative 01.11.2024), based on the estimate delivery time for the outputs above. This timeline will be confirmed as part of the Service Provider Agreement signed between Gold Standard and the implementing partner. As above, Output 4 must be finalised no later than the end of February 2025.

**Competency requirements**

To carry out this assignment effectively, the implementing partner should have the following profile:

1. **Expertise in the regulation of social and environmental safeguards:**

* In-depth knowledge of regulations and guidelines related to social and environmental safeguards in Mexico, Colombia, and Peru.
* Experience with participation and consultation processes, socio-environmental impact assessment, grievance management, and conflict resolution.
* Understanding of credit ownership and carbon rights.

1. **Technical Knowledge in Carbon Markets:**

* Proficiency in carbon calculation methodologies, including baseline definitions, formulas, risk of reversal, mitigation activities, verification, and transparency.
* Familiarity with the Voluntary Carbon Market (VCM) framework and related standards.

1. **Stakeholder Engagement and Participatory Processes:**

* Ability to effectively engage with a wide range of stakeholders, including national and sub-national authorities, communities, project developers, certification bodies, and civil society.
* Experience in conducting interviews, workshops, and participatory spaces for knowledge exchange and feedback collection.

1. **Policy and Governance Analysis:**

* Competence in analysing governance, transparency, integrity, additionality, accounting, methodological consistency, and monitoring and control in VCMs.
* Skills in identifying capacity-building needs and opportunities for public and private sector actors and communities.

1. **Technological Development and Data Management:**

* General knowledge on existing technological tools and information systems for reporting, monitoring, and diagnosing, including software, applications, geovisors, and control dashboards.

1. **Project Management and Coordination:**

* Ability to coordinate and manage multi-country projects, ensuring alignment with the specific needs and regulatory progress of each country.
* Experience in delivering comprehensive reports.

1. **Communication and Reporting:**

* Strong skills in drafting clear and concise documents, including policy briefs for a general audience.
* Ability to synthesize complex information into actionable recommendations and strategic roadmaps.
* Ability to communicate complicated technical concepts in a simple, clear, and easy-to-understand manner.
* A strong professional background with experience of successful project delivery.
* Excellent writing and speaking skills in both English and Spanish.

**Proposal structure**

Applicants should submit proposals relevant to the purpose and description of the assignment including all elements outlined below. Proposals could be submitted in English or Spanish and must be no more than ten pages[[2]](#footnote-3), and should include:

1. **Description of the applicant**: An overview of the implementing partner’s organisation, highlighting experience relevant to this assignment (full project references as per the below template can be annexed to the proposal)
2. **Project team:** Description of the project team, their expertise and role in the project delivery (full CVs can be annexed to the proposal). At least one team member should have professional fluency in Spanish and English. The Service provider should be based in Mexico, Colombia or Peru.
3. **Workplan:** A workplan for the assignment with a timeline, describing the implementing partner’s approach towards delivering the outputs outlined above.
4. **Budget**: The budget must include day rates, person days, the total price of the assignment inclusive of applicable taxes[[3]](#footnote-4), and payment terms. All figures should be presented in USD ($). An example template is provided in *Annex 1 – Example budget and payment schedule template*.

Please note that whilst our maximum budget is **USD 90,000** our tender evaluation will consider price as one of the key factors.

The budget provided should not include any travel related costs as they will be either directly handled by Gold Standard or re-imbursed upon presentation of receipts as per the [ECCC’s travel directive](https://www.njc-cnm.gc.ca/directive/app_d.php?lang=eng) All these costs will need to be pre-approved by Gold Standard.

The following may be included as annexes to the main proposal, in addition to the 10-page limit:

* References for up to 5 projects, to demonstrate experience relevant to the assignment. Project references must be completed in the standard template provided in *Annex 2 - Project reference template*.
* Full CVs of the participating project team members.
* A signed letter declaring the Service Provider’s absence of conflict of interest in relation to the assignment.
* Confirmation of insurance. The Service Provider should include a signed letter confirming their coverage of travel, medical and professional insurance of the team involved in the assignment, as well as the coverage of their social charges in line with the local regulations where the Service Provider is based.

The successful applicants may be invited to a second round of evaluation through (online) interviews to clarify specific aspects of their proposals. Information will be provided in advance to the interviews, if held.

**Evaluation criteria**

Proposals will be evaluated based on, but not limited to, the following formal criteria:

1. **Timeliness**. The proposals must be submitted on or before the stated deadline in order to be considered for further evaluation.
2. **Proposal Format.** The proposals shall follow the requested format and include all of its elements.
3. **Proposed Scope of Work**. Gold Standard will assess to what extent the proposal clearly addresses the needs of the assignment.
4. **Qualifications and Team**. Gold Standard will assess whether the proposed team possesses expertise and relevant experience to assure successful completion of the work and delivery of good quality outputs.
5. **Work plan.** The proposed work plan and approach will be assessed for efficiency, relevance, risk management and technical feasibility.
6. **Budget.** Gold Standard will assess if the budget is reasonable, adequate for the proposed work and provides good value for money.

**Confidentiality**

Proposals should not include proprietary or confidential information. Each recipient of this Request for Proposals should treat the contents of the solicitation as confidential and should use and disclose the contents of the solicitation only for the purposes of preparing and submitting a proposal.

**Privacy**

Gold Standard is compliant with all applicable data protection and privacy laws and regulations especially EU General Data Privacy Regulation (GDPR) and Swiss Federal Act on Data Protection in respect to any personal data (as defined under GDPR) received, collected, or processed in connection with this Request for Proposals.

**Ownership of Proposals and subsequent Products**

Ownership of all work products and work processes produced and delivered by the implementing partner in connection with this Request for Proposals will remain with Gold Standard after the conclusion of this assignment and will not be returned.

**Non-binding agreement**

This Request for Proposal (RFP) is not a binding agreement and shall not be interpreted as such. Rather, this RFP serves only as the instrument through which proposals are solicited. Gold Standard will pursue negotiations with the highest scoring proposal. If, for some reason, Gold Standard and the initial proposer fail to reach consensus on the issues relative to a binding agreement, then Gold Standard may commence contract negotiations with other proposers. Gold Standard may decide at any time to start the RFP process again.

The selected proposer will be required to sign a Service Provider Agreement.

**Applications and closing date**

Please submit your proposal (in English or Spanish) to [pacificallianceproject@goldstandard.org](mailto:pacificallianceproject@goldstandard.org) no later than **29September 2024. 23:59 (UTC-5)**

Gold Standard will acknowledge receipt within 48 hours.

|  |  |
| --- | --- |
| **Indicative timeline** | **Due date** |
| Release of the call for proposals | 10.09.2024 |
| Closing date of the application process | 29.09.2024 |
| Indicative date for award of a contract | 01.11. 2024 |

Annex 1 – Example budget and payment schedule template

**Example budget template**

|  |  |  |  |
| --- | --- | --- | --- |
| Team member | Day rate ($) | Person days | Total ($) |
| **Phase 1 – Scope confirmation** | | **4** | **2,300** |
| Jane Smith | 800 | 1 | 800 |
| John Smith | 500 | 3 | 1,500 |
| **Phase 2 - …** |  |  |  |
| Name… |  |  |  |
| … |  |  |  |
| **Total** | | | **20,000** |
|  |  |  |  |

**Example payment schedule**

|  |  |  |  |
| --- | --- | --- | --- |
| Milestone | Date | Percentage | Amount ($) |
| Acceptance of scope  confirmation document | 15.11.2024 | 10% | 2,000 |
| … |  |  |  |

Annex 2 – Project reference template (maximum 1 A4 page per reference)

|  |  |  |  |
| --- | --- | --- | --- |
| **Project Name:** | **Applicant’s Role in the Project:** | | |
| **Name of Client:** | | **Client Contact Point:** (name, job title, and email address) | |
| **Location of the project** | **Value of the Contract**  **(USD)** | **Duration of Project** | **Name of Associated Consultants/Partners (if any)** |
| … | … | (from..to dd/mm/yyyy) | … |
| **Description of the Project** |  | | |
| **Description of the Actual Services Provided by the Applicant** |  | | |

1. Although Chile is an active member of the Pacific Alliance and the SGT-MR, ECCC's technical and financial support does not cover Chile as it is not an eligible country to receive Official Development Assistance (ODA). [↑](#footnote-ref-2)
2. Any information that exceeds the 10-page limit will not be considered during the evaluation process. This does not include project references and CVs. [↑](#footnote-ref-3)
3. Gold Standard is based in Geneva, Switzerland. [↑](#footnote-ref-4)