



BE-CLME+ project: Promoting national blue economy priorities through Marine Spatial Planning (MES) in the Caribbean Large Marine Ecosystem Plus (GEF Project ID 10211)

Terms of reference for a consultancy to conduct a national blue economy (BE) assessment and a draft BE strategy for the Republic of Panama, including the identification of national sustainable financing options for the blue economy.

1.0 Background and Justification.

1.1 The BE-CLME+ Project is a regional initiative aimed at promoting the development of the blue economy in the Caribbean region through Marine Spatial Planning (PEM) and Marine Protected Areas (MPA), the Ecosystem Approach to Fisheries (EEP) and the development of sustainable climate-smart fisheries, value chains, and knowledge management in Barbados, Belize, Guyana, Jamaica, Saint Lucia and Panama. The Caribbean Regional Fisheries Mechanism (CRFM) is the Executing Agency of the project, while the Development Bank of Latin America and the Caribbean (CAF) and the Food and Agriculture Organization of the United Nations (FAO) are the Co-implementing agencies of the Global Environment Facility (GEF).

1.2 The Project Work Plan and Budget for the year 2023-2024 was approved by the Regional Steering Committee on September 29, 2023, and includes a national consultancy to carry out an analysis of the blue economy and prepare a draft of the BE of the country, including the identification of national sustainable financing options for the blue economy.

1.3 On March 2nd, 2023, a degree signaling Panama's commitment to ocean protection was signed, expanding the country's Banco Volcan Marine Protected Area from approximately 14,200 square kilometers to over 90,000 square kilometers. This expansion protects marine ecosystems and important fishing resources within Panama's national waters in the Caribbean Sea. With the funding of the China Ocean Development Foundation, the First Institute of Oceanography of the Ministry of Natural Resources undertook the Panama Ocean Spatial Planning Project, which aims to sign a memorandum of understanding on ocean space planning cooperation with the Panama International Maritime University and the Marine Coast Division of the Panama Ministry of Environment. Panama's National Ocean Policy articulates and guides the regulations and institutional actions of the government with the purpose of defining and specifying the interaction between public and private actors related to the conservation, monitoring and sustainable use of the oceans while safeguarding the national interest.

2.0 Consulting Objectives

The objective of this consultancy is to carry out a national BE assessment and prepare a draft of the national BE strategy for Panama. The national BE assessment will build on and complement the findings of the other consultancy supported by the 'National data gap and needs assessments to inform MSP'



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project, as the findings of both consultancies are mutually beneficial and will collectively serve to inform MSP and the broader development of BE. The BE strategy will include a specific focus on national sustainable BE financing options, as well as address the other pillars and principles of sustainable BE development within the national context of Panama. The national BE assessment will focus on a review of the BE baseline and stakeholder engagement to determine ongoing national BE programs and priorities, including participation in regional and international BE dialogues and existing CLME planning.

The National BE Strategy will be informed by and developed as a result of the assessment process and will be an informal guidance document to inform national dialogue and will not aim to replace national policy reforms; However, the BE: CLME+ Project will support the desire of individual project countries to elevate their BE processes to the levels necessary to ensure the institutionalization of the National BE Strategy. Because some countries may already have an BE strategy as a national policy document or in the process of developing one, the consultant should seek specific guidance and direction from the BE authorities in Panama on the specific needs and support required to the development and implementation of the BE strategy and adjust the consulting approach accordingly.

3.0 Key activities will include, but are not limited to, those listed below.

3.1 Assess the status of BE knowledge and BE strategic processes in Panama and seek guidance and direction from the BE authorities in the country on the specific needs and support required for the development and/or implementation of the BE strategy and adjust the consulting approach accordingly in consultation with the CRFM/PMU.

3.2 Conduct a national baseline analysis for BE development covering all sectors prioritized for BE development, as well as emerging sectors, and assess the availability and needs of relevant spatial and temporal data of importance to inform national strategies from BE.

3.3 Recommend data sources and collection methods to address identified data needs for BE strategy development and implementation.

3.4 Develop or update, as appropriate and applicable (subject to the outcome of Activity 3.1), a Draft National BE Strategy for Panama as an informal guidance document to inform the national dialogue, ensuring that all sectors prioritized for the development of BE (including fisheries and fisheries value chains) and emerging sectors are represented and BE best practice principles are adopted.

3.5 As appropriate and applicable (subject to the outcome of Activity 3.1), develop or update an Implementation Plan for Panama's National BE Strategy that includes specific actions necessary for the implementation of the priorities defined in the National BE Strategy, the required resources and the responsible entities, schedule, performance indicators, means of verification and estimated budget.

3.6 In the process of developing the Draft National BE Strategy and/or Implementation Plan, ensure input and consultation with key actors from sectors prioritized for BE development and emerging sectors and provide evidence of stakeholder participation.

3.7 Identify at least two (2) national sustainable BE financing options (e.g. Blue Carbon), including structure and operation details (descriptive and graphical illustrations) to be presented as an appendix to the Draft National BE Strategy or of the National BE Implementation Plan, as appropriate.

3.8 Consult with the CRFM/PMU and be informed about the Environmental and Social Safeguards (ESS) activated by the BE: CLME+ Project and identify what data is needed to ensure that the BE strategy and implementation in Panama complies with the ESS activated by the project.

3.9 In coordination with the CRFM/PMU, organize and convene a national virtual workshop to present the results of the National BE Baseline Analysis and the National BE Strategy or Implementation Plan, as appropriate, and to discuss synergies with others national and regional activities and projects.

3.10 The Consultant will be responsible for providing the technical content of the assignment/ consultancy to the CRFM that is consistent with the CRFM's communications guidelines. The content must be communicable to develop at least one (1) communication and visibility material on the National BE Strategy or Implementation Plan for Panama. The communication and visibility material could include press releases, newsletters, flyers, brochures, website content, infographics or social media posts which will be submitted to the CRFM/PMU for review, vetting of content, and onward communication via the CRFM's Knowledge Management and Information System and broader regional networks.

3.11 The consultant shall provide data/information collected from workshops and other activities such as voice recordings, videos, and photographs from interviews, focus groups, etc. as applicable to support the development of communication and visibility material.

4.0 Expected Results and Deliverables.

4.1 Consultants are expected to deliver the following products:

Product 1– An Inception Report and workplan detailing the activities, milestones, timeline, and a solid methodology for accomplishing the task.

Product 2: Draft National BE Baseline Analysis Report.

Product 3: Final National BE Baseline Analysis Report and Draft National BE Strategy and/or Implementation Plan with sustainable BE financing options as an appendix.

Product 4: Final National BE Strategy and/or Implementation Plan with Sustainable BE Financing Options as an appendix.

Product 5: Materials consistent with Section 6.0 of these Terms of Reference.

5.0 Project schedule and milestones.

Deliverables	Date of delivery	Disbursements
Product 1: Initial report detailing activities, milestones, schedule and a solid methodology to carry out the task.	0.5 month after signing the contract.	10% of the contract value.
Product 2: Draft National BE Baseline Analysis Report.	2.5 months after signing the contract.	25% of the contract value.
Product 3: Final National BE Baseline Analysis Report and Draft National BE Strategy and/or Implementation Plan with sustainable BE financing options as an appendix.	3.5 months after signing the contract.	30% of the contract value.
Product 4: Final National BE Strategy and/or Implementation Plan with Sustainable BE Financing Options as an appendix.	5.0 months after signing the contract.	35% of the contract value.
Product 5: Materials consistent with Section 6.0 of these Terms of Reference.		

6.0 Reporting Requirements.

6.1 The consultant will present the deliverables following the schedule established in section 5 of these terms of reference. The deliverables must include reports in Word, PowerPoint presentations and other documents used as the basis of the analysis (including other formats such as Excel spreadsheets, etc. as appropriate) and a folder with the list of bibliographic references used to develop the analysis. Products 1 to 4 will be delivered in both English and Spanish. All reports, studies, plans, drawings, source codes, technical data, specifications and any other materials prepared or worked on by the consultant exclusively for the CRFM under this Agreement are the sole and exclusive property of the CRFM and, as such, the CRFM has exclusive title, rights and interest in all such material, including the right of dissemination, reproduction and publication. The consultant will also work closely with the BE: CLME+ Project Regional Project Coordinator and Marine Spatial Planning Specialist on this consultancy.

7.0 Acceptance Criteria.

7.1 Payments will be authorized once the CRFM accepts the products specified in the TORs. The CRFM will have up to three weeks to provide written comments/recommendations to the consultants' reports.



Unless previously determined, the CRFM will generally accept deliverables once the consultant or consulting firm confirms the following: (i) receipt and further inclusion of comments/recommendations in a revised version and (ii) provision of a date for submission of the revised versions of the submitted deliverables. Consultants are expected to include these comments two weeks after receipt.

8.0 Consultant effort and skills required.

8.1 It has been estimated that this consultancy will require a maximum of 35 Consultant Days.

8.2 Applicants must meet the following requirements:

- Master's Degree in Marine Management, Fisheries Sciences, Coastal Zone Management, Coastal Tourism or Marine Sciences.
- Training in Marine Spatial Planning and/or Blue Economy will be a distinct advantage.
- Minimum 7 years experience working as a technical expert in a marine/maritime field.
- Work experience in some or all of the project countries.
- Experience in developing fisheries management strategies/plans, tourism strategies/plans, MPA management plans, Integrated Coastal Zone Management or MSP plans will be extremely valuable.
- Ability to work with senior government officials, non-governmental organizations (NGOs) and local communities.
- Experience working with resource users in multiple sectors, especially in fishing, protected areas, tourism and maritime transport, etc.
- Good knowledge of biodiversity, Marine Protected Areas, Climate Change, Marine Spatial Planning.
- Technical proficiency (spoken and written) in English and Spanish

9.0 Application and Selection Procedure.

9.1 Interested consultants are invited to submit their Curriculum Vitae (CV), a statement of availability, and a statement of no conflict of interest in English and Spanish.

9.2 CVs will be evaluated against the criteria described in Section 8.2 and recruitment will be subject to successful price negotiation with the selected consultant.

9.3 Interested consultants must submit their application cover letter describing why they believe they are best suited for this task and their CV in PDF format by **May 22, 2024** to secretariat@crfm.int and elmar.lanza@crfm.int.