Annex V: Generic Activities of Local Desk and Budget

TERMS OF REFERENCE
THE TECHNOLOGY TRANSFER LOCAL DESK

Background:

Under the cooperation between Technology Transfer Networks (TTN) and XXXX (the name of a co-financier) as established in the MoU it has been decided to set up a Local Desk (LD) in partnership with %%%%% (the name of the Local Desk host organization). This terms of reference states the activities, outputs, and budget to be executed by the Local Desk.

Targeted Client Groups:

The target groups of the TTN are:

- Entrepreneurs and business decision-makers
- Advisors and experts who regularly assist investment decision-making
- Technology and service providers
- Financial institutions

Objectives:

The objectives of the TTN Local Desk are:

1. To conduct stakeholder consultation and need assessment
2. To broker information and expertise to target groups
3. To assist pipeline entry of financing project proposals
4. To market TTN services
5. To manage day-to-day operation of Local Desk

Activities and Outputs:

1.1 Identify key stakeholders among the target groups as well as national agencies and donor representatives.
1.2 Have regular meetings with identified stakeholders and assess their needs and expectations.
1.3 Record feedback received from stakeholders and report to the TTN management team.

2.1 Develop and keep a roster of local experts with proven records in supporting investment decision-making, preferably, involving cleaner technologies.
2.2 Encourage the information sharing of experts and cases in which they assisted decision-making in appropriate TTN-affiliated web sites.
2.3 Develop and maintain a web site or web pages containing the databases of experts and cases compiled from the country/region or a mirror site of SANet (Optional).
2.4 Register best online resources found in a region/ country in SANet or affiliated web sites.
2.5 Respond to incoming request for services from the target groups (of particular importance is the matchmaking, i.e. finding seasoned experts for entrepreneurs, finding an appropriate success case example, etc.). Utilize information available from SANet in the brokering services.

2.6 Record the nature of request, services provided and feedback received and share the information with TTN.

3.1 Identify eligible projects for financing application and encourage submission of applications; screen incoming proposals and assist clients or TTN management along the application procedure, where necessary.
3.2 Monitor the progress of the co-financed projects by regularly contacting the project owner/ experts
3.3 On completion of the financing support, conduct user survey and receive a letter evaluating the extent of TTN's impact in bringing forward the investment decision.

4.1 Identify and select event or activity opportunities to organize back-to-back seminars/ workshops, aiming at increasing the awareness of TTN services among the target groups, solicit their active participation in the online information sharing, and proactive support to obtain financing through the network.
4.2 Develop and distribute flyers and folders in the local language.
4.3 Develop and distribute CD-ROMs with information published in the SANet web site, preferably in the local language.

5.1 Maintain the office with full accessibility and respond to generic inquiries within one working day.
5.2 Monitor, control and report expenditures.
5.3 Monitor and report operational status to TTN.

Budget (12 months) :

(The items and figures below is subject to negotiation and availability of co-financing from the host organization and other partners. The budget is to be split by TTN and co-financiers.)

Budget Items	Budget (US$)
Staff salary (stakeholder consultation, financing pipeline entry assistance, overall management)	30,400
Online resource development	15,000
Marketing products	4,000
Communication and reporting	8,200
5 workshops	10,000
2 international missions	7,000
Contingency	4,000
Office space, equipment, supplies	In-kind
Total	78,600

ANNEX VI: CONTENT MANAGEMENT MANUAL

Content Management Manual

Last updated 19 November 2002

This manual provides step-by-step guidance on what to do as a Content Manager and how to do the content management efficiently and effectively.

Your responsibility as a Content Manager involves three major tasks:
1. Register and publish the best resources found in the Internet.
2. Review, edit and publish the information filed by site viewers.
3. Answer questions from users regarding site contents.

Please read the following to get yourself familiarized with the works to get the tasks done.

Before we start, please let us recap a very basic point.

SANet Target Clients

- Business/investment planners (hereafter "experts") working for medium- to larger-sized companies that operate in developing countries, Eastern Europe and the Commonwealth of Independent States (former USSR), or those companies that operate elsewhere but make investments in such countries.
- (Policy makers in such countries.)

Since SANet is not creating new information or tools, the value we can add by creating a new website is to collect ONLY the information that has DIRECT utility to the target clients. Rather than compiling 100 pieces of information that can be of little use, we should aim for compiling the ten most useful pieces of information.

1. Getting to the Administration Site

All content management works is done in the SANet's Administration Site (admin site), or "SANet Site Management." The site can be found at www.SustainableAlternatives.net/admin. In order to log-in the site, please enter your username and password. If you are not assigned with a content manager status, please contact Ryoko Fukuhara (rfukuhara@unep.fr) or Guillaume de Rouville (sanet2@unep.fr). Your work will always start from getting to the admin site.

2. Getting to the Administration Site

All content management works is done in the SANet's Administration Site (admin site), or "SANet Site Management." The site can be found at www.SustainableAlternatives.net/admin. In order to log-in the site, please enter your username and password. If you are not assigned with a content manager status, please contact Ryoko Fukuhara (rfukuhara@unep.fr) or Guillaume de Rouville (sanet2@unep.fr). Your work will always start from getting to the admin site.

3. Register and publish the best resources found in the Internet

When deciding what to include, please ask yourself:

Is this of immediate use for the target clients? Could this increase the possibility of making clients consider financially viable, sustainable alternatives in their investment decisions?

1) Search for **online** resources that can be of help when clients are considering new/additional investments. (NOTE: Data entry people should be reminded that only ONLINE resources can be added. Otherwise, experience shows that people may try to create records for resources such as books, newsletters and so on).

- Do not look for generic background information on subject issues. Experts already have background information (and beyond). Look for only the information and tools that can be practically used by clients.
- Make sure the resource is produced by an authoritative source. Do not use resources produced by an anonymous individual (**NOTE**: Guidelines for determining whether a source is authoritative are included at the end of this document).
- The information/tool should have been created or updated within the past five years. Websites should have been updated within the past six months.
- Maintain the regional balance. Most likely a single resource does not cover all geographical regions. Try to find resources that can be applied in different regions of the world. If a resource is only applicable in one region, indicate this in the record.
- When there are useful but for-cost resources, do include them in the directory but explicitly indicate that they are not for free in the short description (see below).
- For databases, select ones from which clients can get information that they can use.
- For assessment/simulation tools, use them yourself before making any judgment. They may claim user-friendliness and accuracy, but may not prove so when actually used. (NOTE: This applies for any resource. See below.)
- If accessing an information resource requires registration, please note that.
- Is the document easy to use? Is it well-organized? Do all the links work? If the site cannot be easily accessed, it should not be included.
- Read the user agreement on the site. If the agreement says that the information on the site may not be copied or stored on another website, we cannot include it.
- Drafts or "for discussion only" items should either be clearly marked as such, or they should be excluded. The majority of the resources should be final versions.
- The majority of the resources should be in HTML format. PDF can be difficult to read and clients may be more used to HTML. Documents that are stored on FTP sites can also be problematic: clients may be blocked from accessing these, or they may not understand how to use FTP sites.
- If a resource is in a language other than English, please note that. For now, preference should be given to resources in English.

2) Enter resource information in the SANet site management template.
- The URL should directly lead clients to a resource page. Do not use the URL of the entry page of a website – then clients have to search for a specific resource to their interest in the website.
- The description of the resource should indicate the practical value of the resource for clients. Do not enter generic descriptions. Outline what clients can get out of the resource.
- If a resource is available in multiple languages or formats (such as HTML, PDF or MS Word), indicate this in the description.
- If a resource requires some skills and knowledge of its users, indicate this in the description.

3) Make sure the information appears properly in the public site.
- If the information/tool doesn't appear properly for no apparent reason, contact Stephen Lapointe (lapointe@grida.no).

4) Check regularly:
- Make sure that links are maintained. When updated information/tools are made available, the link and description should be upgraded accordingly.

5) Make recommendations to the SANet management team.

- When there are potentially useful resources that can be improved by integrating "win-win" consideration or by developing countries' perspective, inform the SANet team. The team will evaluate the resource and, when appropriate, will establish contact with the producer of the resource to discuss possible improvements.
- Similarly, when a specific tool (and to a lesser extent, information) requires some training for users to make most of it, recommend the SANet team to organize training workshops.
- Contacts: Ryoko Fukuhara (rfukuhara@unep.fr) or Guillaume de Rouville (sanet2@unep.fr).

4. Review, edit and publish the information filed by site viewers

While registering new resources is, in a sense, entirely within your own hand, reviewing, editing and publishing the information filed by site viewers puts you in a position of "quality controller." The information filed by general viewers do not go straight to the public site until you "publish" it to the public site – you are a "gate keeper," so to speak. Here's a procedure we suggest for this activity:

1) Establish a content reviewer group
   We know you are expert(s) (that's why you are the Content Manager!), but you may find some information difficult to judge or it may call for specialized expertise. Let's get prepared before we get into a panicking situation. It'd be good to have a group of people whom you can call upon to seek their advice, as needed. Also, don't forget to agree on a standardized procedure – this suggestion is only "theory," and you'll probably need to adjust this to the reality. That will be a learning process for the SANet team as well.

2) Check the incoming registrations
   Back to the admin site, there's a menu column in the left side of the page. The menu you need to check regularly is members (experts), cases and resources. Check these pages at least once a day.

3) Checkpoints: Incoming registration of resources
   - According to the Content Management Guidelines.

4) Checkpoints: Incoming registration of experts
   - Is credential provided? (details of the method to be determined by the SANet team)
   - Are coordinates complete? (If not, write to or call him/her to request additional information.)

5) Checkpoints: Incoming registration of cases
   - Is the case new and original? (double check for duplicated registration – this may happen as the number of data grows.)
   - In case that the case looks to duplicate an already published case, inquire the registering expert whether the cases are identical or not.
   - If it is a duplicating case, invite the registering expert to add his/her name in the existing case.
   - If the case is original, is there at least one set of complete coordinate information?
   - Is the description of the results concise, coherent, clear and informative?

6) Publish the information

Information of resources, experts and cases should be published within five working days of the receipt of registration. Please don't forget to check how the new information looks in the public site.

5. Communicate with Local Desks

Regular interaction with the Local Desks is an integral part of reviewing the data. When you publish a new data that came from the vicinity of a Local Desk, invite them to have a look the new publication and give you feedback. They are the best sound board to test how a data is going to be received by local clients – the ultimate target audience.

Also they may help you get additional information. For example, when there's a case with coordinates of an expert only, they may know the project developer and technology provider of the case, and they can invite those people to register additional information so that the case becomes more informative.

Occasionally Local Desks may give you suggestions regarding contents. We would like to encourage such an interaction between you and the Local Desks – we believe this is one of the excellent networking opportunities we can offer to our partners.

6. Answer questions from site viewers regarding the contents

We are planning to put your email address in the sector- or subject-specific area, so that viewers can send you questions regarding a specific content. Please don't worry about being requested to act as an "expert advisor" – this should be left to the expert directory. If you receive emails requesting such a service, please refer them to the expert directory (www.SustainableAlternatives.net/expertise/request.cfm?, registration required). We assume that your task in this regard is mainly to direct viewers to a right contacts – since questions regarding a resource can be best answered by the developer of that resource. When you receive questions, please keep them in a file – later on, we will create a FAQ page in the website.

7. Guidelines for Determining Whether a Source is Authoritative

To help you determine whether a **website** is an authoritative source, consider:

- is there clear information about the goals, mission or history of the organization or business?
- is the site free of goals that suggest a bias or conflict of interest? (For example, information about nuclear safety may be biased if it comes from a nuclear power plant.)
- Some guidelines should be established for resources that come from political organizations.
- can you determine who funds the site? If not, the resource should not be included.
- is it an institutional, not a personal website? Personal websites should be excluded.
- is the website being maintained? Consider: are there no more than two or three broken links? Is there information from within the last year on the site?

Completeness and depth of coverage:

- reports and research papers should cover everything that they aim to cover in the introduction, foreword or executive summary
- online documents must be complete: they should include all the parts listed in the table of contents.
- depth of coverage: is the subject covered in detail, or is it only an introduction to the topic? If it is only an introduction, will it still be valuable to our clients?

More questions? Please get in touch with Stephen, Guillaume or Ryoko!

ANNEX VII: SAMPLE LETTER OF INVITATION AND PRE-QUALIFICATION REQUEST TO A TTN LOCAL DESK

Future Energy Solutions
AEA Technology Environment
153 Harwell IBC
Didcot
Oxfordshire
OX11 0QJ

Mr. R.C.Monga
Dy. Director General (Technological Services)
National Productivity Council
5-6 Institutional Area
Lodi Road
New Delhi - 110 003
India

14th March 2003

Dear Mr Monga

The International Energy Agency's Implementing Agreement on Energy and Environmental Technologies Information Centres (EETIC) and the United Nations Environment Programme's Sustainable Alternatives Network (SANet) have agreed to collaborate in taking forward a series of mutually beneficial activities and have signed a Memorandum of Understanding to this end. A key part of this collaboration is the support of pilot Local Desks to better address needs of key stakeholders in developing countries.

We would like to invite your organisation to provide information on its willingness and capabilities to provide the services required from a Local Desk based in New Delhi, India.

The Local Desks will operate on a regional or national basis and should offer a comprehensive package of advisory and match-making services. This philosophy underlies the fact, recognised by both UNEP and EETIC, that information databases and clearing houses are not an end but are one means of enabling informed decision making to take place.

The capabilities that EETIC and SANet believe are required for a Local Desk partner are defined in the attached documents. The attachments also provide more background on the organisations involved in the collaboration.

Marketing materials and training in the services offered by EETIC and SANet will be provided.

The estimated annual budget allocated as direct financial support to the Local Desk is USD 40,000.

We would expect the appointed Local Desk partner to contribute in-kind to the project through, for example, providing office space, computer equipment, copying and printing facilities and human resources.

In your expression of interest for operating the proposed Local Desk you should

1. provide information that addresses each of the points i to xiii in the attached Annex 1.

2. provide information on how you would deliver activities 1 to 12 listed in Annex 2.

3. provide Curriculum Vitae for the proposed Local Desk Director and other key staff and their hourly charge rates, length of working day and proposed estimated time spent on Local Desk activities.

4. Provide a simple letter of statement about the availability of in-kind contributions (no specification is necessary at this stage).

If you have any questions please do not hesitate to contact me via e:mail or telephone. I would be grateful if you could confirm **as soon as possible and not later than March 24th 2003** that you are interested in providing an expression of interest.

We would like to have an operational Local Desk in the very near future. I would therefore request that you provide me with the information described in this message and its attachments **by 10th April 2003**.

After the receipt of your letter of interest we will arrange for more in-depth discussion about the work plan, timetable and budget. Subsequently, SANet/EETIC and the successful candidate for Local Desk partner will seek an endorsement of GEF's Operational Focal Point in India.

The successful candidate for Local Desk partner will be expected to agree an Memorandum of Understanding, initially for one year, with UNEP and a contract with EETIC's Operating Agent, Future Energy Solutions. The Local Desk partner will report jointly to:

1. EETIC's Operating Agent, Future Energy Solutions (part of AEA Technology) based in Harwell, Oxfordshire, UK
2. UNEP-DTIE, based in Paris, France.

UNEP and EETIC (Future Energy Solutions) reserve the right not to enter into an arrangement with any partner in India.

If you have any questions or wish to discuss any issues this letter or the specification raises please contact Dr Chris Naish chris.naish@aeat.co.uk

Yours sincerely

Joint Local Desk for EETIC - SANet Collaboration

1. Background

The organisations EETIC and SANet (see below) have signed a Memorandum of Understanding to collaborate in taking forward a number of joint actions that are beneficial to the aims and objectives of both.

It has been agreed:
- to establish Local Desks (LDs) in a limited number of countries
- that EETIC will manage the energy content area in the SANet website

to carry out other activities that address cleaner technology transfer in the energy sector.

THE PARTNERS IN THE COLLABORATION AND THEIR AGENTS

EETIC

Energy and Environmental Technologies Information Centres (EETIC) is an Implementing Agreement set up under the auspices of the International Energy Agency. The Information Centres (CADDET Energy Efficiency, CADDET Renewable Energy Technology and GREENTIE), operated under the EETIC Implementing Agreement, provide information on technology projects, particularly newly demonstrated technologies, and on suppliers of greenhouse gas mitigating technologies and services.

The EETIC Information Centres help countries to meet their Kyoto Protocol targets and provide a shop window for their technologies and industries.

Sustainable Alternatives Network

Sustainable Alternatives Network (SANet) is a project of the United Nations Environment Programme at the Division of Technology Industry and Economics (UNEP-DTIE), funded by the Global Environment Facility (GEF). SANet's mission is to increase the flow and environmental quality of investment projects in GEF recipient countries by supporting business managers in making informed decisions regarding investments in cleaner technologies. SANet offers internet-based information services, face-to-face communication at the country level and technical assistance for investment planning with a view to promoting technologies that have positive impact on the global environment, thereby serving the objectives of Multilateral Environmental Agreements. For more information please visit www.SustainableAlternatives.Net.

AEA Technology plc (through its trading unit 'Future Energy Solutions') is the body selected by the EETIC Contracting Parties to be Operating Agent for Annexes I, II and III of the Implementing Agreement and thus responsible for operating the designated Tasks according to the annually agreed Programmes of Work and Budget.

GRID-Arendal, entrusted by UNEP to operate the SANet web site and to support partnership developments, provides environmental information, communications and capacity building services for knowledge management and assessment. Established to strengthen the United Nations through its Environmental Program, GRID-Arendal's mandate is to make credible knowledge available and understandable to decision-making for sustainable development.

2. Objective of the collaboration

The objective is to offer an integrated response to knowledge management and information dissemination needs in order to increase shares of public and private enterprises whose investments and business practices help to reduce greenhouse gas emissions.

3. Implementation

EETIC and SANet have agreed to work on drawing specific attention to available and newly emerging "win-win" solutions that translate environmental benefits into competitive advantage and sustainable contributions to overall economic development.

The key areas of work within the collaboration can be defined as:

- EETIC and SANet will jointly develop a network of Local Desks;
- EETIC will become the key supplier to SANet of information on greenhouse gas mitigating technologies and suppliers;
- SANet and EETIC will work together in developing countries, to support regional centres and facilitate the establishment of regional networks to enable delivery of high quality decision support services to public and private sector clients.

The collaboration that is now agreed and operational is now taking forward plans to initiate and support pilot Local Desks (LDs) in a limited number of countries.
The required capabilities of a Local Desk operator are presented in Annex 1

Annex 1

Required Capabilities for Local Desk Operator

The following capabilities are required from the Local Desk operator:

i. organizations/persons with suitable experience in the relevant field and proven track records;

ii. experience in various areas of energy including energy efficiency and renewable energy;

iii. Expertise in technical, financial, institutional and planning issues;

iv. detailed knowledge and understanding of,- and ability to effectively reach key stakeholders[1] in the country that would benefit from the existence of a Local Desk;

v. ability to effectively reach these key stakeholders and involve them in a process for further development of the scope and activities of the Local Desk[2];

vi. range of staff with suitable qualifications and experience or ability to engage such staff;

vii. long term access to suitably equipped offices including computers and web access;

viii. experience in providing advice and efficient follow-up and Ability to record and log all calls, actions and follow-up;

ix. understanding and experience of marketing;

x. Independence and objectivity;

xi. personal/organizational networking track record;

xii. constant presence in an office with telephones manned during all normal office hours throughout every working day of the year and e-mails quickly replied to (initial response within 2 business days).

xiii. willingness to contribute financially (including in-kind)[3]

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1 i.e. industry, other commercial sectors, entrepreneurs, equipment suppliers, funding bodies, banks, utilities, consultants, government, regulators and other Local Desks (SANet and others)

[2] Effective reach may be manifested through personal networks as well as own internet sites, email distribution lists, professional newsletters and journals, conferences, workshops, fairs, other events.

[3] Global Environment Facility, the main funder of SANet, emphasises the importance of co-financing (including in-kind) as an indicator of the strength of the commitment of the counterpart organisations and beneficiaries, and to ensure the success and local acceptance of projects by linking them to sustainable development, and thereby maximises and sustains their impacts.

Annex 2
Scope of EETIC/SANet National Local Desk activities

1. Host mirror internet sites according to specifications to be determined in agreement with EETIC/SANet.

2. Compile and publish local and regional-specific information through the SANet web site; screen any information before it is published in the directories in the public website, -using SANet's web based tools[4] or other means agreed within EETIC/SANet co-operation framework.

3. Communication of EETIC/SANet information, and win-win cases, and explanation of best ways and means to contribute to and to gain from EETIC/SANet to local experts;-expert referral upon EETIC/SANet request (in cases where automated matchmaking through EETIC/SANet sites does not work); -third party review of registered cases and financing requests.

4. Assess the needs and expectations of the local business community and other key stakeholders. We envisage this would be implemented partly through a few targeted workshops with the local business community and possibly some public sector representatives.

5. Bring together SANet clients with locally/regionally available experts who offer in depth technology, investment assessment and financing expertise, and can conduct on-site feasibility studies; this in order to facilitate "win-win" investment cases, and expertise registration, as well as quality assurance.

6. Review, filter and process incoming requests for financing of specific assessments concerning sustainable investment[5].

7. Secure participation of the local finance community; and

8. Mobilize funds from local offices of donor agencies

9. conduct client outreach and marketing of the EETIC and SANet services;

10. track information relating to client data and report to EETIC/SANet;

11. perform the day-to-day management and administration of the Local Desk and national SANet sub-portal in accordance with all contractual, legal and regulatory requirements;

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4 The content for every portal is managed with web-based tools developed and maintained by GRID-Arendal. Using a web browser such as Microsoft Internet Explorer, content managers at partner organizations can perform such tasks as add a resource to a content category in their sector. Content managers can manage content from any location, since all they need is a browser. Thus, the partnering organization will not need to undertake any web development tasks as part of this agreement; rather, the partner will serve as content manager.

5 For selected projects that meet a set of criteria, including the prospect of yielding quantifiable environmental benefits, technically feasibility, and readiness for investment should the risk analysis prove positive, SANet would offer financing that cover 49 percent of the due-diligence cost (maximum USD 49,000).

12. immediately inform EETIC/SANet of any problem or difficulty which might arise out of the performance of its obligations.