



Leading Collaborative Petroleum
and Renewable Energy Research.



Request for Proposals

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The importance of ESG reporting for Nova Scotia's energy sector supply chain

RFP Release Date: January 17, 2022

Proposal Due Date: February 18, 2022 (5 pm AST)

Contact

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1. Introduction

[OERA](#) is a leading energy research organization advancing Atlantic Canada's transition to a low-carbon future. We are encouraging growth of a sustainable energy sector by leading applied research in critical topics, including [hydrogen](#), [offshore wind](#), [geothermal energy](#), [tidal energy](#), and [energy system modeling](#). Our focus is on advancing research that will help decarbonize our region's economy, mitigate climate change impacts, and move Atlantic Canada toward net-zero emissions by 2050. As a member of the [50-30 Challenge](#), we are committed to increasing workforce diversity in the energy sector.

This Request for Proposals (RFP) is issued by OERA in the context of a collaborative program funded by the Nova Scotia Department of Natural Resources and Renewables. This work supports the Province's broad energy policy objectives related to climate change, inclusive economic development, and the sustainable development of Nova Scotia's energy resources.

2. Context

Many jurisdictions have set ambitious greenhouse gas (GHG) emission reduction targets for the coming decades. The pathway to reaching these important milestones includes a portfolio of decarbonization strategies that will set off significant energy infrastructure development projects. These complex projects will require a network of supply chain organizations, each contributing value during project implementation. How organizations are selected as project partners is project-dependent, but often based on a multi-category scoring system, which increasingly includes Environmental, Social and Governance (ESG) criteria.

Demonstrating commitment to ESG principles and reporting has become an integral part of partner selection and investment decision making processes in many industries and jurisdictions. While many large organizations invest in formal ESG programs and reporting, the concepts may still be in the early adoption stage with smaller organizations in the supply chain.

Nova Scotian companies are well-positioned to participate in projects that lead to lower GHG emissions, in Canada and abroad. It is therefore essential for industry to understand the



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importance of ESG in decision making processes as well as common best practices in the energy and other industries.

OERA is therefore requesting the submission of proposals for a report that (1) provides an overview of industry based ESG elements and programs and details the importance in decision making processes, (2) describes observed best practices in small and medium sized organizations (including a case study), and (3) proposes a plan to disseminate relevant ESG related information to Nova Scotia's energy sector supply chain.

3. Objectives

The objective of this RFP is to obtain the services of a consultant (the Respondent) to prepare a report that can be used by the Nova Scotian energy sector supply chain to recognize and understand the important role of ESG and associated best practices in small and medium sized organizations.

4. Scope of Work

The scope of work consists of three primary tasks:

Task 1: Information Review and Data Gathering

Task 2: Assessment and Analysis

Task 3: Reporting

The final deliverable must cover the following topics, although the report structure can be defined by the proponent.

1. ESG – Description, Impacts and Challenges

The report should define the elements and collective significance of ESG across industries and provide insight into ESG methodologies, with specific emphasis on the energy sector. This section should discuss the importance of ESG elements in decision making processes and detail the recent evolution of ESG standards with specific commentary on current and future trends – e.g., whether ESG reporting



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structures will become more formalized and/or standardized in the future, in particular for current and emerging renewable and clean energy projects.

2. Best Practices

Building on the findings of section 1, the report should discuss ESG implementation and reporting best practices in small and medium sized organizations in the energy and other sectors. The report should also comment on whether other jurisdictions and/or organizations are currently proposing or adopting ESG standards and reporting measures as prerequisites in energy system transition related RFP processes. If so, the report should provide a comprehensive overview of the standards and reporting methods used.

3. Case Study

The report should include an energy sector related case study of a small or medium sized organization that has successfully implemented ESG reporting. The case study should provide details regarding the ESG standards and reporting methods used, the implementation process, timeline, cost (if quantifiable), opportunity cost and perceived benefits and challenges of implementing ESG reporting.

4. Engagement Plan

While the emphasis of the report should be on the findings of sections 1 – 3, the report should also discuss how these findings can be efficiently communicated to Nova Scotia's energy supply chain. An engagement plan should detail the communication methods, key stakeholders, and engagement timeline. The respondent is not expected to implement the plan; rather this task should provide a framework or outline of how such an outreach program would be structured and implemented.

5. Deliverables

Upon project completion, the proponent will provide:



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(1) A report that presents the findings of Tasks 1 and 2. Both a draft version and final version are required with the opportunity for the review committee to recommend reasonable changes to the draft version for inclusion by the proponent in the final version before the project ends.

(2) Presentations (in PowerPoint) to the review committee to accompany submission of the draft and final versions of the report. The presentations will review the project and its main findings.

6. Timelines

The proponent is expected to host regular project status meetings via video conference. OERA will host the kickoff meeting. The following timeline outlines OERA's expectations with respect to timing.

RFP release date:	January 17, 2022
Proposal due date:	February 18, 2022 (5 pm AST)
Project kickoff:	Week of February 28, 2022
Final report:	April 29, 2022

7. Funding

Funding available for this project is capped at a maximum of CAN \$ 45,000 including taxes. Proposals that exceed this amount will not be considered. Note that proposals will be rated first in terms of experience/team/work plan and second in terms of value. Please include a cost-task breakdown (time per person per task) showing hourly or daily rates.

Please note that OERA reserves the right not to proceed with project award.

8. Proponent Qualifications

The successful applicant must demonstrate knowledge and experience in ESG principles, standards, and reporting, particularly with regards to industrial stakeholders. In addition, the successful applicant must demonstrate knowledge of the Nova Scotian energy sector and its supply chain. Experience with undertaking jurisdictional scans is beneficial. Proposals should



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explain the experience and qualifications of the project team and provide references where available (both literature and previous clients).

Proposal Requirements

- The proposal should be concisely worded with clearly described objectives, methods, budget, schedule, and deliverables. Maximum 15 pages excluding appendices, title page, and cover letter. Please assemble all components into a single PDF document.
- The proposal should include a description of the Respondent's organization and its relevant experience with similar projects. The Respondent must also describe the relevant work experience of the key staff assigned to this project and their roles on the project. This material should be summarized in the body of the RFP and can be presented in more detail, if needed, in the appendix.
- Please provide a project organizational chart showing the role and reporting hierarchy of project partners and reporting lines to the OERA review committee.
- A single electronic document is sufficient. Please ensure the proposal or cover letter is signed by an officer or equivalent with authority to bind the Respondent to the statements made in the proposal.
- The electronic copy should be uploaded in PDF format to the OERA-FTP site available at <https://oera.sharefile.com/r-rad4c16d556614ecb8a53c6cf708cbe8e>. The file name should include an abbreviated form of the proponent's name.

9. Questions and Clarifications

OERA will accept content-related questions from interested applicants on an ongoing basis until February 4, 2022, 1 pm (AST). If content-related questions are received, a Q&A page will be made available on the OERA website at <https://oera.ca/opportunities/request-proposals/importance-esg-reporting-nova-scotias-energy-sector-supply-chain>. The names and organizations of those submitting questions will remain anonymous; only the question and OERA's response will be posted. Interested parties are encouraged to check the Q&A page for updated information and/or clarifications that may help in completing their proposal.

Please submit your questions by email to Sven Scholtysik (sscholtysik@oera.ca).



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10. Evaluation

This project will be administered through OERA. As shown below, proposals will be quantitatively evaluated against a set of criteria.

Factor	Weight
Experience and Knowledge: Qualifications, experience and capabilities of the company and delivery team; demonstration of knowledge relevant to this study and the Nova Scotian energy sector.	30%
Project Plan, Approach and Methodology: Proponent demonstrates an understanding of the project service requirements and has outlined a clear and effective work plan. Proposal describes the objectives, methodology, milestones and deliverables, and a sound approach in undertaking this project. Communication format and frequency between the proponent and OERA are clearly described. Proponent describes an achievable schedule with well-defined milestones and demonstrates the ability to complete the work on or before the desired completion date.	30%
Proposal Presentation and Organization: The proposal includes all RFP requirements, demonstrates attention to clarity, grammar, presentation, and comprehensibility.	20%
Value: The project will offer good value for the proposed budget. The budget is clear, convincing, and well-described.	20%
Total:	100%