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Ref. GFP-004

## STATEMENT OF WORK (SOW)

### 1 SCOPE OF WORK

1.1 The required work is to develop a set of Best practices for managing biofouling in recreational boating and marinas (Best Practices).

### 2 PURPOSE

2.1 The aim of the Best Practices is to assist the twelve beneficiary countries of the GloFouling Partnerships project (Brazil, Ecuador, Indonesia, Fiji, Jordan, Madagascar, Mauritius, Mexico, Peru, Philippines, Sri Lanka and Tonga – referred to as Lead Partnering Countries, in short LPCs) in providing guidance to manage biofouling in recreational sailing, motorboats, yachts and marinas. The Best practices are aimed at the recreational boating community with the following four objectives:

- Help its intended audience to understand the role of biofouling on recreational sailing, motorboats and yachts as a pathway for the introduction of aquatic invasive species;
- Help understand the specific impacts of biofouling and invasive aquatic species on the marine environment and its biodiversity;
- Provide guidance for the management of biofouling in a practical and cost-effective manner for all potential users and types of recreational vessels; and
- Explain the benefits and advantages derived from improving biofouling management across marinas and recreational vessel users.

2.2 The Best Practices are expected to offer guidance in line with the *Guidelines for the control and management of ships' biofouling to minimize the transfer of invasive aquatic species* (IMO Biofouling Guidelines), and the *Guidance for minimizing the transfer of invasive aquatic species as biofouling (hull fouling) for recreational craft*, published in 2011 and 2012, respectively, under the aegis of the International Maritime Organization (IMO). These two documents provide a globally consistent approach to the management of biofouling for recreational craft, by recommending a set of management measures to prevent the introductions aquatic invasive species.

### 3 CONTEXT AND BACKGROUND INFORMATION

3.1 GloFouling Partnerships (<https://www.glofouling.imo.org/>) is a 5-year technical cooperation project and a joint initiative of IMO with the United Nations Development Programme (UNDP) and the Global Environment Facility (GEF), to protect marine ecosystems from the negative effects of invasive aquatic species transferred through biofouling on ships and other marine structures. The project started in January 2018 and will end in December 2023.

3.2 IMO implements (through the GloFouling Partnerships' Project Coordination Unit - GloFouling PCU) the project activities, including the identification of appropriate strategies for legal, policy and institutional reform with a view to implement the IMO Biofouling Guidelines and other relevant codes of conduct or industry standards.

3.3 The spread of invasive aquatic species (IAS) via biofouling attached to the hulls and other surfaces of recreational sailing craft, motorboats and yachts has been singled out as one of the key pathways for local spread of IAS through biofouling. In some areas, marinas have proven to have a larger variety of alien species than commercial harbours. Some developing countries and Small Island Developing States, such as Fiji and Tonga in the Pacific, or the Caribbean States, are particularly at risk because they are frequently at the centre of major recreational boating routes.

3.4 This key environmental issue could be tackled with effective implementation of best practice, underpinned by research and supported by a global dissemination through the broad network of national sailing and boating associations. The Best Practices are expected to enable sailing and yachting communities to take effective measures to reduce the risk of spreading IAS when sailing or moving boats to new areas. The document will reach sailors through World Sailing's 145 member nations and 115 member classes, and ICOMIA's international marine industry and marina membership.

3.5 This scope of work may be undertaken by an individual expert/consultant or a team of experts/consultants. Henceforth, the text will invariably refer to both options as "Expert", regardless of the number of people that will be selected to take on the assignment.

## **4 REQUIREMENTS**

4.1 The Expert should identify existing practices, detect potential knowledge and practice gaps, and make specific recommendations that could improve biofouling management in recreational sailing, motorboats, yachts and marinas. The resulting Best Practices must provide the following:

- Brief description of biofouling, its impact on recreational sailing craft and motorboats and its role as a pathway for IAS;
- Brief description of what are biofouling invasive aquatic species (IAS), and the impacts they cause on the environment;
- Description of the key areas that need special attention for the purpose of managing biofouling, specific for the main types of recreational sailing vessels and motorboats, boat trailers, marina slipways and Marine Straddle Carriers. Where relevant, reference should be made to vessel design and construction materials;
- Description of recommended measures that need to be applied to manage biofouling in an effective manner, taking into account specificities of different environments, facilities and vessel types, range of antifouling options (coatings and other technologies, application of coatings), and maintenance strategies (preventing growth, cleaning and inspecting);
- Explanation of the economic and environmental benefits derived from applying the Best Practices to improve biofouling management;

- List of references and sources of information; and
- Links to further resources.

4.2 Additionally, the Expert should also provide a Supplementary report (in the form of an annex to the Best Practices or as a separate document), with the following information:

- Description of gaps identified during the development of the Best Practices, such as barriers for implementation of best practices, unavailability of resources or materials, geographical differences, local regulations, etc., and recommendations of work required to provide solutions and overcome remaining barriers;
- Recommendations on how to present, communicate and enhance the use and circulation of the Best Practices among potential users; and
- Guidance for national administrations in developing countries on the key aspects that should be considered when drafting a national outreach plan to promote the Best Practices, including recommendations on how to plan effective communications and the use of marketing tools and awareness-raising materials.

4.3 The list of requirements outlined above is comprehensive, but may not necessarily be exhaustive. The Expert is encouraged and expected to provide any additional suggestion on the content and/or format of the Best Practices that is deemed relevant in fulfilling the objectives of this Assignment.

## **5 DESIGN, FORMAT AND LANGUAGE**

5.1 The Best Practices will form the basis for the design of a glossy publication or information brochure addressed to end users (i.e. recreational boating community and marina staff, and administrators working directly and indirectly in operational and technical measures related to biofouling management). The Expert should take this into account when drafting the Best Practices, and ensure that they take the form of a practical, user friendly "How to" Guide, with steps, examples and check lists, and suggested infographics.

5.2 The Best Practices shall be drafted in English. To the extent possible, clear/plain language, tables and visuals must be used so it is easy for non-specialised audience to understand what is required and make informed decisions.

## **6 QUALITY CONTROL**

A quality control process must be undertaken by the Expert early in the development process of the Best Practices to ensure that the final version is adequately designed and formatted to achieve its end purpose.

## **7 MILESTONES AND FINAL DELIVERABLE**

The Expert shall achieve all seven Milestones and deliver the Final Draft of the Best Practices (Final Deliverable) for the completion of this Assignment. Milestones and Final Deliverable are described hereunder:

**Milestone 1 – Initial Meeting:** a meeting will be organised between the PCU and the Expert to discuss the present SOW and best approaches for the completion of this Assignment, as well as any other relevant issues.

**Milestone 2 - Detailed Methodology and Work Plan:** Based on discussions with the GloFouling PCU for this Assignment during the **initial meeting**, the Expert must provide a final methodology and work plan. This document must describe, in detail, the methodology (how the Expert intends to approach the development of the Best Practices) and work plan (based on actual calendar) to achieve the Requirements outlined above. This document must also reflect interactions with the PCU during the initial meeting and any further discussion after the meeting.

The PCU will review this document and provide comments to the Expert within eight (8) working days after receiving the document.

**Milestone 3 - Preliminary Observations:** Presentation of preliminary observations by the Expert during a **second meeting**, no later than five (5) weeks after the Assignment award date, will provide an opportunity to confirm direction, timelines and to discuss any issues the Expert or the PCU may foresee.

**Milestone 4 – Table of Contents/Outline:** The Expert must provide a Table of Contents or a general outline of the different parts/sections of the Best Practices and the Supplementary report, describing structure and content.

The titles of sections and subsections must be indicated with a brief description of their contents, and how they link to requirements.

The PCU will coordinate the review and provide comments to the Expert within ten (10) working days after receiving the document.

**Milestone 5 – Draft 1:** The Expert must provide one electronic copy of the Draft 1 in Microsoft Word format. Draft 1 shall contain all sections of the Best Practices as well as the Supplementary report and reflect work described in the Requirements of this SOW.

The Draft 1 must also consider and address any comments from the PCU and discussion outcomes received during and after meetings and communications between the PCU and the Expert.

The PCU will coordinate the review and provide comments to the Expert within ten (10) working days after receiving the Draft 1.

**Milestone 6 – 3rd (mid-project) Meeting:** A third meeting will be required following the PCU review of the Draft 1 to confirm direction, timelines and provide the opportunity to discuss any issues the Expert or the PCU may foresee.

**Milestone 7 – Draft 2:** The Expert must provide one electronic copy of the Best Practices and Supplementary Report in Microsoft Word format. Draft 2 shall be an almost finalised version that incorporates/addresses all comments provided by the PCU on Draft 1; during the 3rd Meeting and during communications exchanges thereafter between the PCU and the Expert.

The PCU will coordinate the review of Draft 2 and provide comments to the Expert within ten (10) working days after receiving it.

**Deliverable – Final Draft:** The Final Draft must incorporate/address all comments provided by the PCU during the completion of this Assignment. The Final draft document will be

considered as final and meeting all requirements of the present Assignment only at the satisfaction of the PCU.

The Expert must provide the Final Draft electronically in Microsoft Word and Adobe Acrobat (PDF) formats.

## **8 REQUIREMENTS REGARDING MATERIAL PRODUCED**

8.1 Background material, information or other items used to develop the Best Practices (such as notes, text, graphics, surveys, raw data, spreadsheets and records of discussions) shall be made available to the PCU.

8.2 All rights, including title, copyright and patent rights, in any work produced by the Expert for this Assignment, shall be vested in IMO, which alone shall hold all rights of use. Where necessary, adequate authorisation shall be secured for any third-party materials included in the Best Practices.

## **9 COMMUNICATION**

Regular feedback (every two weeks as feasible) through email, and/or phone calls must be maintained between the Expert and the PCU during the completion of this Assignment.

## **10 WORK LOCATION**

All work will be performed from the Expert's (or team of experts) place of business. All eventual meetings with the PCU (and any other relevant person or other IMO staff) and presentations will be conducted by conference call or in person (if practical). In this latter case, travel costs related to the meeting shall be borne by the GloFouling Partnerships project.

## **11 EXPERT (OR TEAM OF EXPERTS) PROFILE**

11.1 The Expert should have sound knowledge of, and direct experience with, the development of industry-led practices and recommendations.

11.2 The Expert should have good knowledge of shipping, biofouling and related environmental issues. Familiarity with specific issues related to recreational boating and marinas would be considered an asset.

11.3 The Expert should also have solid drafting skills. Capacity to present recommendations and instructions in a practical and clear, understandable manner is essential.

## **12 TENTATIVE ASSIGNMENT START AND END DATE**

Start: 1 October 2020.

End: 31 January 2021.