

TERMS OF REFERENCE 1

REGIONAL

IFD/CTI

Experiential Learning of Cluster Development Best Practices in Small and Vulnerable Countries

RG-T3519

Compete Caribbean Partnership Facility – Consultant to Provide Training & Technical Assistance for Cluster Firms to Improve Productivity and Quality Standards

TERMS OF REFERENCE

Background: The purpose of the Compete Caribbean Partnership Facility (CCPF) is to drive inclusive and sustainable economic growth through greater competitiveness and innovation in the private sector. One instrument the CCPF uses to accomplish this mandate is “Clusters and Support to Value Chains”. The value of clustering for the Caribbean’s small and medium private sector organisations lies in the opportunity to become more competitive through cost savings, cost sharing, co-branding and innovation. The combined efforts of networking and strategic alliances can lead to a stronger international profile. Ultimately, business clusters tend to generate employment and revenues for the SMEs involved within and across value chains. Research suggests that clustering upgrades the sophistication of diverse stakeholders involved such as suppliers, wholesalers, regulatory bodies, government/NGOs, as well as university and training institutions.

Under CCPF’s Regional Cluster Capacity Building Program for Business Support Organizations (BSOs), which uses a learning-by-doing approach, training provided required each BSO to mobilize relevant private and public stakeholders across government agencies to apply the cluster methodology in the design of Cluster Development Plans (CDPs). These CDPs/cluster projects were pitched live before the Investment Panel (IP) on July 26th 2019; of these, this cluster project was deemed suitable by the IP for funding from CCPF for implementation.

Based on rigorous analysis of regional and international markets, the CDPs identify the most attractive market segments and outline strategic priorities to increase their global competitiveness within these segments.

These strategic priorities include training and technical assistance to improve: (A) coordination mechanism among BSOs and private sector stakeholders on the ground; (B) productivity and/or quality standards; and (C) marketing and product development.

The objective of this consultancy is to provide training and technical assistance to the Cluster to improve productivity and quality standards.

The Team

The purpose of the Compete Caribbean Partnership Facility (CCPF) is to support the region in driving competitiveness and sustainable economic growth. The program focuses on: (i) supporting

firms to grow, innovate and enter new sectors and markets; and (ii) promoting an environment that enables innovation and growth. More specifically, the CCPF's objectives are to:

- a. Increase productivity in firms;
- b. Increase employment, particularly for women and vulnerable groups;
- c. Generate and sustain exports within and outside the region;
- d. Foster sustainable and inclusive economic growth.

What you'll do:

The candidate will carry out the following key activities that will facilitate the achievement of the objective:

- Study background documents on the Cluster; liaise with the firms in the cluster, the BSO, and other public and private sector stakeholders, and CCPF to develop a more in-depth understanding of the assignment.
- Assess the capacity building needs of the Cluster.
- Prepare an Inception Report that details the Contractual's findings; and presents a Work Plan with clear timelines and SMART capacity building results to be achieved by the end of the assignment, and a training plan covering all training that is a part of the capacity building.
- Facilitate a workshop to obtain stakeholder inputs and produce a SMART Action Plan for improving the Cluster's productivity and quality standards. The Action Plan must prioritize the actions, assign responsibilities for implementation, provide reliable estimates for the cost of implementation, and indicate sources of funding.
- Prepare training materials for all approved training events.
- Prepare concise bi-Monthly Progress Reports (every two months) that describes and provides evidence of the progress made in implementing the Work Plan, achievements and challenges during the reporting period; and (ii) planned achievements and activities during the upcoming period.
- Prepare a Final Report that summarizes results achieved and makes recommendations for any additional strengthening of the Cluster and for further productivity and quality improvements.

Deliverables:

The candidate will be responsible for the delivery of the following products:

- Draft Inception Report within 2 weeks of contract signing.
- Revised Inception Report within 3 days of receipt of comments from the BSO and CCPF.
- Draft Training Materials at least 2 weeks before scheduled training events.
- Revised Training Manual within 3days of receipt of comments from the BSO and CCPF.
- Bi-Monthly Progress Reports (every two months) within 1 week of the end of the reporting period.
- A Final Report within 24 weeks of contract signing.

Payment timeline:

Payment terms will be based on project milestones or deliverables. The Bank does not expect to make advance payments under consulting contracts unless a significant amount of travel is required.

| Payment Schedule | |
|---------------------------------|-------------|
| <i>Deliverable</i> | % |
| 1. Revised Inception Report | 20% |
| 2. Bi-Monthly Progress Report 1 | 30% |
| 3. Bi-Monthly Progress Report 2 | 30% |
| 4. Final Report | 20% |
| TOTAL | 100% |

Skills you’ll need:

- Education: Master’s degree or equivalent, in Business Administration and International Business, or a related field.
- Experience: At least 10 years of experience developing and implementing strategies and action plans for improved firm competitiveness. Specific experience in quality standards. Extensive experience in training design and delivery.
- Languages: Excellent ability to communicate in English, both written and spoken.

Core and Technical Competencies:

- Highly developed communication skills, and training/facilitation skills, including the preparation of high quality reports.
- Ability to work under pressure, sometimes with extended hours, and to meet tight deadlines without compromising the quality of outputs.
- Ability to maintain confidentiality and use discretion when dealing with sensitive intellectual property issues.

Opportunity Summary:

- **Type of contract and modality**: Product and External Services Contractual, Lump Sum
- **Length of contract**: Six months; forty (40) non-consecutive working days.
- **Location**: External consultancy. Three separate missions are expected with approximately 4 days on the ground for each mission.
- **Responsible person**: Michael Hennessey, Private Sector Development Specialist, of the Competitiveness, Technology and Innovation Division (IFD/CTI).
- **Requirements**: Candidates must be individuals from any IDB member country (IDB’s 48 member countries) or non-IDB member countries recognized by the Donors of the Compete Caribbean Partnership Facility as eligible.

Our culture: Working with us you will be surrounded by a diverse group of people who have years of experience in all types of development fields, including transportation, health, gender and diversity, communications and much more.

About us: At the Inter-American Development Bank, we’re devoted to improving lives. Since 1959, we’ve been a leading source of long-term financing for economic, social, and institutional

development in Latin America and the Caribbean. We do more than lending though. We partner with our 48 member countries to provide Latin America and the Caribbean with cutting-edge research about relevant development issues, policy advice to inform their decisions, and technical assistance to improve on the planning and execution of projects. For this, we need people who not only have the right skills, but also are passionate about improving lives.

Payment and Conditions: Compensation will be determined in accordance with Bank's policies and procedures. The Bank, pursuant to applicable policies, may contribute toward travel and moving expenses. In addition, candidates must be individuals from any IDB member country and non-IDB member countries recognized by the Donors of the Compete Caribbean Partnership Facility as eligible.

Diversity: The Bank is committed to diversity and inclusion and to providing equal opportunities to all candidates. We embrace diversity on the basis of gender, age, education, national origin, ethnic origin, race, disability, sexual orientation, and religion. We encourage women, Afro-descendants and persons of indigenous origins to apply.

TERMS OF REFERENCE 2

Consultancy to Support Product Development & Design Marketing Strategies

REGIONAL RG-T3519

Public Link: [pending]

Experiential Learning of Cluster Development Best Practices in Small and Vulnerable Countries

1. Background and Justification

- 1.1. The purpose of the Compete Caribbean Partnership Facility (CCPF) is to drive inclusive and sustainable economic growth through greater competitiveness and innovation in the private sector. One instrument the CCPF uses to accomplish this mandate is Clusters and Support to Value Chains. The value of clustering for the Caribbean's small and medium private sector organisations lies in the opportunity to become more competitive through cost savings, cost sharing, co-branding and innovation. The combined efforts of networking and strategic alliances can lead to a stronger international profile. Ultimately, business clusters tend to generate employment and revenues for the SMEs involved within and across value chains. Research suggests that clustering upgrades the sophistication of diverse stakeholders involved such as suppliers, wholesalers, regulatory bodies, government/NGOs, as well as university and training institutions.
- 1.2. Under CCPF's Regional Cluster Capacity Building Program for Business Support Organizations (BSOs), which uses a learning-by-doing approach, training provided required each BSO to mobilize relevant private and public stakeholders across government agencies to apply the cluster methodology in the design of Cluster Development Plans (CDPs). These CDPs/cluster projects were pitched live before the Investment Panel (IP) on July 26th 2019; of these, this cluster project was deemed suitable by the IP for funding from CCPF for implementation.
- 1.3. Based on rigorous analysis of regional and international markets, the CDPs identify the most attractive market segments and outline strategic priorities to increase their global competitiveness within these segments.
- 1.4. These strategic priorities include training and technical assistance to improve: (A) coordination mechanism among BSOs and private sector stakeholders on the ground; (B) productivity and/or quality standards; and (C) marketing and product development.
- 1.5. These CDPs have a strong export focus and aim to improve the competitive position of each cluster in market segments identified. To penetrate these ideal market segments,

the clusters will need to develop marketing strategies, branding and distribution channels for each target market.

2. Objectives

2.1. The objectives of this consultancy are to advise the Cluster on product development, to conduct marketing research in the market segments identified, and design relevant marketing strategies and accompanying action plans.

3. Scope of Services

3.1. In developing the respective marketing strategies, the consulting firm will first analyse the Clusters' product offering, and provide recommendations on how the product can be enhanced to meet the requirements of the target market. The firm will also conduct research in the various markets, as a basis of these recommendations, and also as a means to inform the design of marketing strategies that should specify branding and distribution channels for the Cluster's products. The firm will work closely with the Cluster in the design of the strategies and the related action plans, providing costing and timelines for each marketing activity.

4. Key Activities

The consulting firm will carry out the following key activities that will facilitate the achievement of the objective:

- 4.1.** Conduct desk research to become familiar with the Cluster, sector, value chain, growth potential, cost drivers, and risks.
- 4.2.** Conduct a market study and analysis to inform the branding, marketing and communication strategies, given the business context, target markets and the competitors.
- 4.3.** Provide recommendations to improve the product offerings.
- 4.4.** Developing a strategy for the marketing and sales of the Cluster's products, clearly defining the marketing mix and using competition and customer analysis.
- 4.5.** Develop an action plan to implement the marketing strategy, specifying the route to market by clearly outlining branding and distribution channels.

5. Expected Outcomes and Deliverables

5.1. Workplan: This project management plan (logframe) includes a synopsis of the

consultancy, proposed activities, timelines (including dates for the proposed missions and milestones), responsibilities, expected outputs and outcomes (results). The workplan will be updated as necessary in discussion with the clusters and agreement with the CCPF/IDB.

5.2. Report on Product Development: The report should provide specific recommendations for improving the Cluster's products to better meet the requirements of the target market, giving costing and steps to complete each suggested initiative.

5.3. Marketing Strategies & Action Plans: A comprehensive marketing strategy and action plan detailing activities, costing and timelines.

6. Project Schedule and Milestones

6.1. The project is expected to begin January 2020, 2019 and to be completed six (6) months thereafter. At least two (2) missions of four days each are expected. Traveling and workshop costs are included in the consulting firm's budget. The schedule and milestones will be defined by the firm in agreement with the IDB and clusters and captured by the first deliverable (the workplan).

7. Reporting Requirements

7.1. Every report must be submitted to the Bank in an electronic file. The report should include cover, main document, and all annexes. Zip files will not be accepted as final reports, due to Records Management Section regulations.

8. Acceptance Criteria

8.1. All deliverables will be reviewed by the IDB/CCPF. Comments will be provided by written email. The consulting firm is expected to provide written feedback on how comments were addressed.

8.2. Approval of quality deliverables will be provided in writing by email from the Team Leader of the project.

9. Supervision and Reporting

9.1. The consultancy will be supervised by Michael Hennessey IFD/CTI at The Inter-American Development Bank, and coordinated by Compete Caribbean's Pillar 1 - Coordinator for Productivity and Innovation in the Private Sector. The Consulting Firm is expected to work closely with the cluster firms.

10. Schedule of Payments & Qualifications

10.1. Payment terms will be based on project milestones or deliverables. The Bank does not expect to make advance payments under consulting contracts unless a significant amount of travel is required. The Bank wishes to receive the most competitive cost proposal for the services described herein.

10.2. The IDB Official Exchange Rate indicated in the RFP will be applied for necessary

conversions of local currency payments.

| Payment Schedule | |
|--|-------------|
| <i>Deliverable</i> | % |
| 1. Acceptance of Final Work Plan (Deliverable 1) | 25% |
| 2. Acceptance of Report on Product Development | 25% |
| 3. Acceptance of 1 st Draft of Marketing Strategy | 25% |
| 4. Acceptance of Final Marketing Strategy & Action Plan | 25% |
| TOTAL | 100% |

11. Qualifications to Utilize in Criteria for Selection:

11.1. Qualifications of Team Members:

- Master’s Degree in Business Development, Marketing, Communications, Business Management or related field

11.2. Skills and Experience in:

- At least ten (10) years of professional experience and proven track record in marketing and sales.
- Specific experience in developing Marketing Strategies.
- Excellent written and verbal communication skills in English

11.3. Core Competencies

- Highly developed communication skills, including the preparation of high quality reports;
- Ability to work under pressure to meet tight deadlines without compromising the quality of outputs;
- Ability to maintain confidentiality and use discretion when dealing with sensitive intellectual property issues.

TERMS OF REFERENCE 3

REGIONAL

IFD/CTI

Experiential Learning of Cluster Development Best Practices in Small and Vulnerable Countries

RG-T3519

Compete Caribbean Partnership Facility – Cluster Manager

TERMS OF REFERENCE

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Under CCPF’s Regional Cluster Capacity Building Program for Business Support Organizations (BSOs), which uses a learning-by-doing approach, training provided required each BSO to mobilize relevant private and public stakeholders across government agencies to apply the cluster methodology in the design of Cluster Development Plans (CDPs). These CDPs/cluster projects were pitched live before the Investment Panel (IP) on July 26th 2019; of these, this cluster project was deemed suitable by the IP for funding from CCPF for implementation.

The objective of this consultancy is to support the BSO staff with project implementation, particularly stakeholder coordination, monitoring implementation progress, and with quarterly reporting to CCPF.

The Team

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- e. Increase productivity in firms;
- f. Increase employment, particularly for women and vulnerable groups;
- g. Generate and sustain exports within and outside the region;
- h. Foster sustainable and inclusive economic growth.

What you'll do:

The candidate will carry out the following key activities that will facilitate the achievement of the objective:

- Oversee and ensure implementation of the cluster project, in accordance with a detailed workplan and agreed schedules. The workplan must include a monitoring and evaluation section.
- Coordinate the establishment and work of a project steering committee to guide and monitor project implementation.
- Assist the BSO to drive project implementation on the ground, and monitor actual progress against planned progress, proposing solutions to the BSO and CCPF for any implementation challenges.
- Facilitate on the ground coaching and advisory services with cluster stakeholders to encourage ongoing consensus around the ideas and activities underpinning the initiative, and ensure participation of the various stakeholder groups, including women and women-owned firms.
- Oversee the collection of baseline data including that related to the project's results matrix, as well as regular monitoring data.
- Review and provide feedback on proposals and deliverables of Consultants to be hired under the project.
- Coordinate with any other consultants hired under the project.
- Provide timely and regular reports to all key stakeholders to facilitate management of the CDP. For the IDB/Compete Caribbean monthly progress updates via email and online meetings will be required, along with formal progress reports every quarter.

Deliverables:

The candidate will be responsible for the delivery of the following products:

- A detailed implementation work plan (inclusive of a monitoring and evaluation plan) and schedule, two (2) weeks after the start of the consultancy;
- Seven (7) timely project progress reports for every three-month period of implementation using the template provided, 10 days after the close of the period;
- Project closing report (PCR) inclusive of a sustainability plan for the cluster, no later than one month after the close of the project;
- Mission reports, as identified in the workplan or as otherwise requested.

Payment timeline:

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| Payment Schedule | |
|---------------------------|----------|
| <i>Deliverable</i> | % |
| 1. Workplan | 15% |
| 2. Progress report #1 | 10% |

| | |
|---------------------------|-------------|
| 3. Progress report #2 | 10% |
| 4. Progress report #3 | 10% |
| 5. Progress report #4 | 10% |
| 6. Progress report #5 | 10% |
| 7. Progress report #6 | 10% |
| 8. Progress report #7 | 10% |
| 9. Project closing report | 15% |
| TOTAL | 100% |

Skills you'll need:

Education: Master's degree in Business Administration, Project Management, or related field.

Experience: At least 10 years of working experience in project management and/or in project monitoring and evaluation. Specific experience in the following areas: private sector development, cluster management.

Languages: Excellent ability to communicate in English, both written and spoken.

Core and Technical Competencies:

- Excellent communication skills, and ability to establish and maintain good working relationship with private sector, government and other organisations.
- Facilitation and leadership skills with ability to relate to broad range of stakeholders.
- Ability to collect and analyse data and information.
- Demonstrated skills in project preparation and report writing.
- Trustworthiness and integrity and a demonstrated ability to work independently in challenging environments
- Have a flexible approach and persistence to optimize results.

Opportunity Summary:

- **Type of contract and modality:** Product and External Services Contractual, Lump Sum
- **Length of contract:** Twelve (12) months
- **Starting date:** TBD
- **Location:** Belize/Dominica/Grenada/Guyana/St. Lucia/Suriname.
- **Responsible person:** Michael Hennessey, Private Sector Development Specialist, of the Competitiveness, Technology and Innovation Division (IFD/CTI).
- **Requirements:** Candidates must be individuals from any IDB member country (IDB's 48 member countries) or non-IDB member countries recognized by the Donors of the Compete Caribbean Partnership Facility as eligible.

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