

## Terms of Reference (TOR)

### **Provision of Services related to the development and implementation of a BLOOM training series for cleantech companies and entrepreneurs in Barbados under the project “ Strategic platform to promote sustainable energy technology innovation, industrial development and entrepreneurship in Barbados (SAP: 150123)**

**Date:** 23 August 2023

#### **1. General Background Information**

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The United Nations Industrial Development Organization (UNIDO) is the specialized agency of the United Nations that promotes industrial development for poverty reduction, inclusive globalization and environmental sustainability. The mission of UNIDO, as described in the *Lima Declaration* adopted at the fifteenth session of the UNIDO General Conference in 2013 as well as the *Abu Dhabi Declaration* adopted at the eighteenth session of UNIDO General Conference in 2019, is to promote and accelerate inclusive and sustainable industrial development (ISID) in Member States. The relevance of ISID as an integrated approach to all three pillars of sustainable development is recognized by the 2030 Agenda for Sustainable Development and the related Sustainable Development Goals (SDGs), which will frame United Nations and country efforts towards sustainable development. UNIDO’s mandate is fully recognized in SDG-9, which calls to “Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation”. The relevance of ISID, however, applies in greater or lesser extent to all SDGs. Accordingly, the Organization’s programmatic focus is structured in four strategic priorities: Creating shared prosperity; Advancing economic competitiveness; Safeguarding the environment; and Strengthening knowledge and institutions.

The United Nations Industrial Development Organization (UNIDO), the Ministry of International Business and Industry (MIBI), Export Barbados (BIDC) are implementing the Global Environment Facility (GEF) funded project “Strategic platform to promote sustainable energy technology innovation, industrial development and entrepreneurship in Barbados”. The project contributes to the implementation of the National Strategic Plan 2005-2025, which aims at making Barbados a “green circular economy” and the “most environmentally advanced green country in Latin America and the Caribbean”.

The GEF project has achieved laudable progress. With support from UNIDO, the Barbados Cleantech Cluster (BLOOM) became fully operational in 2020. It is hosted by BIDC and has already established a broad range of international partnerships. In line with its business plan, the cluster provides office space, intelligence, funding for prototyping and various incubation and acceleration programs either home-made or in cooperation with other partners. BLOOM also provides targeted training programs for its companies and start-ups.

To learn more about UNIDO go to [www.unido.org](http://www.unido.org). The BLOOM website is available at: [www.bloomcluster.com](http://www.bloomcluster.com). Further information on the GEF-UNIDO project is available at: <https://open.unido.org/projects/BB/projects/150123> and the 2022 Barbados Clean Tech Industry Report.<sup>1</sup>

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<sup>1</sup> [https://www.gn-sec.net/sites/default/files/bp/attach/clean\\_tech\\_industry\\_report\\_29nov2022\\_final.pdf](https://www.gn-sec.net/sites/default/files/bp/attach/clean_tech_industry_report_29nov2022_final.pdf)

## **2. Scope of the contracted services**

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To enhance the capacity of the start-ups and companies of the BLOOM incubation and acceleration programmes, as well as the cluster management team, UNIDO intends to offer a series of training workshops, which will also be used for content marketing purposes. This will provide the BLOOM companies and cluster team with the opportunity to interact with experts and boost knowledge specific areas of need. To facilitate the process, UNIDO and BLOOM are seeking support from an experienced and qualified training company or institution with focus on small- and medium sized enterprises (SMEs). Specifically, the contractor will provide the following deliverables:

1. Identification of the training needs of the BLOOM members and cluster team
2. Development of a training plan and development of curricular
3. Development of a series of hybrid/online workshops on thematic areas
4. Selection of expert trainers in specific sectors related to the thematic areas
5. Provision of relevant digital training materials
6. Reporting on participants' experiences, opinions and key findings of the series

The selected supplier will deliver the following activities:

1. Developing a training needs assessment report
2. Developing the workshop series plan and programme
3. Creating pre and post event surveys
4. Supporting RSVP and pre-event activities
5. Acting as the speaker and facilitator at the events
6. Recording presentations from the workshop
7. Promotion of the workshop on Bloom social media platforms

### 3. Deliverables, General Time Schedules and payment terms

TASKS	DELIVERABLES	Tentative working days and delivery schedule	PAYMENT TERMS
1. <i>Training needs assessment report with outlined training methodology and schedule</i>	Trainings needs assessment report to be approved by UNIDO/BLOOM after consultation with the BLOOM start-ups and local and/or international trainers (incl. detailed activity plan, curricular proposal, identified trainings, time schedule, and methodologies). The contractor will be supported by the BLOOM Cluster team.	4 w/d  To be provided one month after contract signature	20 % upon approval of training schedule
2. <i>Delivery of the training sessions in 8 thematic areas</i>	The contractor will plan, develop and conduct a series of training workshops (in-person/online) commencing October 2023 until April 2024 aimed at providing clients with the introductory knowledge, skills, and abilities required to not only operate more efficiently in the business world, but also to develop their businesses, brands, and market share. It is estimated that active participation in eight workshop sessions (1.5 hours each) will be required. Physical presence of a local consulting expert is a requirement. Additionally, participation of international experts will be organized by skype/zoom, if required.	18 w/d  To be provided seven months after contract signature	50% upon conducting trainings and provided training analysis report
3. <i>Development of the Training Analysis report, incl. summary document for UNIDO and Bloom</i>	Based on the trainings conducted, the analysis of the trainings conducted in line with the assessment results. The report will be written and designed in an appealing and marketable way (incl. infographic design). It is directed towards use for social media marketing and will include feedback from attendees at the training. <u>The report and the summary document will be provided by the contractor fully edited, designed and ready to be published in English.</u>	3 w/d  To be provided seven months after contract signature	
4. <i>Development of Content Material from trainings and</i>	Images of all aspects of the training should be recorded/photographed. Imagery/Video of the planning, results of the training and any other content material will be mainstreamed in future marketing efforts of	5 w/d  To be provided eight	30% upon approval of the content material

<i>social media management</i>	BLOOM Content from the workshops should be provided by the contractor fully edited, designed (incl. graphs) and ready to be published. The company will provide social media management services regarding the implemented trainings. All files will be provided in editable high-quality format (e.g., vector graphics) and will become the property of BLOOM/BIDC and UNIDO.	months after contract signature
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**TOTAL**

**30 w/d**

The activities under this contract shall be completed within a period of eight (8) months from the effectiveness of the contract. It is essential that the contractor is locally represented in Barbados and employs local experts. The proposed plan for implementation of activities and deliverables:

Deliverables	Months							
	1	2	3	4	5	6	7	8
Deliverable 1 – Training needs assessment report								
Deliverable 2 – Delivery of Trainings								
Deliverable 3 – Training Analysis Report								
Deliverable 4 – Marketing Material Content								

In addition, the contractor will be required to deliver the following:

- Item **High-resolution photographs (min. 3 MB, at least 20)** – that illustrate the undertaken activities. The consultants will cede all appertaining rights to unlimited use of the respective pictures to UNIDO and the Government of Sao Tome and Principe.
- Item **All used raw files and calculation sheets** in editable format (e.g., xls). All files need to be handed over and become property of BLOOM/BIDC and UNIDO.

#### 4. Coordination and Reporting

English is the working language for this assignment. The contractor will report to the BLOOM Cluster team in close coordination with the UNIDO Project Manager (Vienna). Moreover, the contractor will coordinate closely with the BLOOM start-ups and companies, which are the final beneficiaries of the services. All drafts and final deliverables are subject to prior approval by UNIDO and BLOOM/BIDC.

#### 5. Available budget

The available all-inclusive budget for this assignment is **USD 21,000** (twenty-one thousand US Dollars).

#### 6. Qualification requirements, evaluation and language criteria

Received technical bids need to comply with, and will be evaluated according to the following criteria below:

MINIMUM ELIGIBILITY REQUIREMENTS		VALUE	SCORE
1	Registered company or institution with at least three (3) years of experience in developing and implementing training programs for companies and SMEs in the Caribbean, including Barbados (please provide a copy of the <u>Certificate of Incorporation</u> if company).	Yes	qualify
		No	does not qualify
2	Immediate availability of the contractor; ability to implement the assignment; Usually, no travel is required for the assignment.	Yes	qualify
		No	does not qualify
3	Financial Strength of the company. Please provide the completed and signed <u>UNIDO Financial Statement Form</u> .  <b>Profitability</b> Profit Margin Ratio or Return on Assets Ratio should be preferably positive.  <b>Solvency</b> A solvency ratio should be preferably more than one (1). In case of negative profit margin ratio or solvency, UNIDO may request additional documents and/or adapt payment terms and conditions.  <b>Turnover</b> The average annual turnover for the past three (3) years (or for the period of time the bidder has been in business, if it has not yet reached three (3) years) should be at least 1 time more than anticipated value of the contract.	Yes	qualify
		No	does not qualify
4	Completed and signed Statement of Confirmation (Annex 1 to the TOR).	Yes	qualify
		No	does not qualify
5	Completeness of the technical and separate financial offer (e.g. CVs, track record, legal and financial documents, all-in price incl. all taxes).	Yes	qualify
		No	does not qualify
CRITERIA FOR THE QUALITY ASSESSMENT OF TECHNICAL OFFERS		VALUE	SCORE
1	Quality and coherence of the overall technical offer and efficiency of the proposed execution modality and team set-up; technical offers shall reflect the analytical capacity of the project team and avoid just a repetition of the text in the TOR); full proficiency in English; At least one expert of the project team shall obtain a Masters related to education and/or entrepreneurship development.	good	25
		regular	15
		poor	0
2	More than ten (10) years of accumulated work experience of the project team and demonstrated quality track-record of implemented training programs for companies and SMEs. Documentation on at least three (3) implemented training programs shall be provided.	good	25
		regular	15
		poor	0
4	More than ten (10) years of accumulated work experience of the project team regarding social media management of conducted	good	25
		regular	15

	trainings and training contents. Documentation of at least three (3) training media series.	poor	0
5	More than ten (10) years of accumulated work experience of the project team members in facilitating training programs for the private sector in Barbados.	good	25
		regular	10
		poor	0
	MAXIMUM SCORE		100

In accordance with UNIDO procurement rules the technically acceptable bid with the most competitive (**all-inclusive**) price will be awarded. Only technical proposals with a quality score of 70 or more, while a minimum score for each technical evaluation criterion is no less than the respective regular point (10 or 15 depending on items), will qualify for the commercial evaluation. UNIDO reserves the right to request additional information from bidders if necessary.

Bidders should note that only technically compliant offers/proposals should be further considered for commercial evaluation.

The bidder should submit a financial offer in US Dollars, in the format shown under the Annex (breakdown of the financial proposal). Bidders must have an account in US Dollars in which they provide their financial offer.

## 6. Application Procedure

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Interested and qualified bidders shall submit their written proposals in English:

- Technical proposal (including proposed approach and methodology, work and activity plan, detailed CVs of experts, copies of university degrees, certifications, licenses as well as proven track record of implemented assignments);
- Separate financial proposal in USD including all costs and taxes (includes a detailed work-time-expert-diagram indicating daily rates for individual team members); offers without all-in price will be rejected;
- Documents demonstrating the quality of the track-record of the project team with regard to industry reports, preferable in the cleantech sector.

Bidders are requested to submit their proposals by registering on the UNIDO e-procurement portal (<https://procurement.unido.org/>). In case of difficulties, please contact the UNIDO Help Desk at [procurement@unido.org](mailto:procurement@unido.org) or [ene-procurement@unido.org](mailto:ene-procurement@unido.org)

## 7. Further information

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- GEF-UNIDO CEO Endorsement Document, <https://open.unido.org/projects/BB/projects/150123>
- <https://www.gn-sec.net/content/barbados-sustainable-energy-industry-market-assessment-report>
- <https://www.thegef.org/project/strategic-platform-promote-sustainable-energy-technology-innovation-industrial-development>
- [https://www.gn-sec.net/sites/default/files/bp/attach/clean\\_tech\\_industry\\_report\\_29nov2022\\_final.pdf](https://www.gn-sec.net/sites/default/files/bp/attach/clean_tech_industry_report_29nov2022_final.pdf)
- <http://bloomcluster.com/>
- <https://www.gn-sec.net/content/bloom-regional-program>
- [www.unido.org](http://www.unido.org)

**Note to suppliers:** A **circular economy** is an economic system that tackles global environmental challenges like climate change, biodiversity loss, waste, and pollution. It is a framework of four principles, driven by design: eliminate waste and pollution, keep products and materials in use, regenerate natural ecosystems and use of renewable energy. **Bidders are encouraged** to display the products' circularity and sustainability compliance with the Economic, Social and Governance principles under the UN Compact (<https://www.unglobalcompact.org/take-action/leadership/integrate-sustainability/roadmap/supply-chain>).

**DISCLAIMER:** All information, figures and data presented in this Terms of Reference are the property of UNIDO and protected by copyrights. No part or parts of this document shall be used for purposes other than preparing the proposal.