

TERMS OF REFERENCE

CONSULTANCY

UPDATE OF CARIBBEAN EXPORT'S CAPACITY BUILDING TRAINING FOR SMES- PRODUCTIVITY NETWORK (PRONET)

1. BACKGROUND INFORMATION/RATIONALE

1.1 Relevant background

Caribbean Export Development Agency is currently implementing the European Union (EU) Global Gateway Regional Private Sector Development Programme III. The overall objective of this programme is to contribute to sustainable and inclusive economic growth and job creation in the Caribbean Region. Through targeted interventions that provide new and innovative frameworks for growth and development, the Agency seeks to achieve two specific objectives in support of the overall goal:

1. Reinforce private sector diversification and competitiveness in the Caribbean, with a special on SMEs including women and youth owned enterprises.
2. Enhance Trade and Investment between the Caribbean and the EU in the framework of the Economic Partnership Agreement (EPA) including support to B2B dimension and assisting the Caribbean private sector to grow in an inclusive and sustainable manner, including in the area of services.

To achieve the above-mentioned goals, the Agency carries out numerous programme-based activities designed to enhance the competitiveness of regional small and medium-sized enterprises (SMEs). Caribbean Export also works to strengthen the institutional capacity of public and private sector agencies and business support organisations (BSOs).

Caribbean Export introduced the Productivity Network (ProNET) programme in 2012, in partnership with the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ). Over the years CE has worked with dozens of National Business Support Organisations across the CARIFORUM region to deliver this training to hundreds of SMEs.

ProNET is a practical skills development programme for SMEs seeking to improve their competitiveness. The programme is based on the Experiential Learning Methodology: case study based and driven by practical examples and assignments. It is action-oriented by using techniques such as plenary group work and structured learning exercises, open-ended discussion, brainstorming sessions, and fieldwork. The Experiential Learning Methodology is built on the premise that participants share their current experience by means of exercises, initially in small groups, and thereafter with the entire group with guidance from the facilitators.

The programme offers a series of 10 modules covering the key areas in managing and enhancing the competitiveness of a business. Each module can be booked separately based on the needs of the SMEs.

The current modules are listed below:

1. Business Strategy
2. Quality Management
3. Production Management
4. Resource Management
5. Product Development
6. Information Management
7. Human Resource Management
8. Cost and Financial Management
9. Export Marketing
10. Energy Management and Renewable Energy

The modules are delivered by certified trainers who lead the sessions over the duration of the 2- or 3-day sessions, done in person.

During the COVID-19 period, CE continued to implement training to SMEs through virtual means, oftentimes the Zoom platform.

In the second quarter of 2022, the Agency undertook a targeted survey of the three main groups of beneficiaries (SMEs, ProNET trainers, National Business Support Organizations) to review the usefulness of the training over the years as well as its continued relevance and attendant course content 10 years on. The responses indicated that there is a need for training for SMEs in the region, however, there are some notable areas for improvement.

The survey revealed staple ProNET courses such as Export Marketing and Cost and Financial Management as highly demanded courses, however, it recognized the necessity of updating to improve SME competitiveness in an evolving trading environment. New areas of training in Innovation and Business Model Development, E-commerce and Technology, Cybersecurity, Business Recovery and Continuity were among the new training courses identified. The necessity of a practical component of the programme was also recognized.

An update of ProNET's training programme will provide regional SMEs with the necessary tools to operate effectively and competitively in a transitioning global economy.

In alignment with the goals of the Global Gateway Regional Private Sector Development Programme III, Caribbean Export, with support from the Inter-American Development Bank/Compete Caribbean is implementing the Caribbean Digital Transformation Institute (CDTI). CDTI is a pivotal initiative aimed at driving the digital transformation of the region's private sector, particularly SMEs. By leveraging digital technologies, CDTI seeks to enhance the competitiveness and resilience of Caribbean businesses in the global marketplace. One of the Agency's expectations is that the CDTI (which is expected to be launched by the end of the year), will become the main vehicle through which SMEs will access online capacity building. Thus, the integration of the ProNET courses onto this digital platform is a key consideration. This allows SMEs to access essential training modules such as Business Strategy, Export Marketing, and Cost and Financial Management, among others, in a more flexible and accessible online format.

The CDTI platform will not only facilitate the delivery of these vital courses but also expands the curriculum to include new areas of training identified as critical for modern business success, such as E-commerce, Cybersecurity, and Business Recovery and Continuity. By providing these resources digitally, CDTI ensures that SMEs across the Caribbean are equipped with the tools and knowledge necessary to innovate, operate competitively, and adapt to the challenges of a rapidly evolving global economy. This integration of digital transformation with traditional business training underscores the Agency's commitment to fostering a more inclusive and future-ready Caribbean private sector.

1.2 Contracting Authority

The contracting authority for this assignment is the Caribbean Export Development Agency and is funded by the Global Gateway Regional Private Sector Development Programme III.

1.3 Beneficiary Countries

The primary beneficiaries under this project are the private sector SMEs in CARIFORUM countries: (Antigua and Barbuda, Bahamas, Barbados, Belize, Dominica, Dominican Republic, Grenada, Guyana, Haiti, Jamaica, St. Kitts and Nevis, Saint Lucia, St. Vincent and the Grenadines, Suriname and, Trinidad and Tobago).

1.4 Target Groups

CARIFORUM private sector.

2. OBJECTIVE, PURPOSE & EXPECTED RESULTS

2.1 Overall Objective

The overall objective of this Consultancy is to enhance the capacity and competitiveness of private sector firms across CARIFORUM countries by updating and digitising Caribbean Export's ProNET training program. This will enable businesses to effectively respond to the evolving global economic landscape, particularly in areas such as sustainability, digitalization, and e-commerce.

2.2 Specific Objectives

The consultancy specifically aims to:

- **Review and Enhance ProNET Course Modules**
Conduct a comprehensive review of the existing ProNET course modules to ensure alignment with current global trends, including recovery strategies, sustainability and digitalization and integrate relevant updates.
- **Strengthen Private Sector Competitiveness**
Update the ProNET course content to equip the Caribbean private sector with the necessary skills and knowledge to enhance their competitiveness and capacity to navigate and succeed in the global economy.

- **Develop New Training Modules**

Identify and develop new training modules that address emerging needs and interests of the private sector, such as innovation, business model development, and business continuity.

- **Digitisation of the ProNET Training Program**

Convert the updated ProNET training program into a digital format to be hosted on the Caribbean Export's eLearning platform, powered by Velsoft, as part of the Caribbean Digital Transformation Institute (CDTI). This will provide greater accessibility and flexibility for SMEs across the region to engage in the training.

2.3 Purpose of consultancy and expected results

The purpose of this Consultancy is to fortify the skills and capabilities of private sector firms in the CARIFORUM region, enabling them to enhance their competitiveness, adapt to global economic shifts, and expand their market reach. By updating and digitising the ProNET suite of modules, the consultancy will produce a modernized training program that reflects the needs of today's business environment.

The expected results include:

- A fully updated ProNET training program that meets contemporary business challenges.
- A digital version of the ProNET training modules accessible through the CDTI's Velsoft e-learning platform, providing SMEs with the tools to implement these skills into their business operations.
- Increased competitiveness of the Caribbean private sector in regional and international markets, as businesses integrate the training into their strategic and operational processes.

This digital transformation of the ProNET training program is expected to have a lasting impact on the region's economic resilience and ability to thrive in a dynamic global market.

3. ASSUMPTIONS AND RISKS AND MITIGATION

3.1 Assumptions

- Regional Business Support Organization (BSO) and other partners will provide support to the intervention.
- There is great demand for the intervention.
- Modules and course content will meet the needs of the private sector.

3.2 Risks

- Firms are not receptive to the new course modules.
- Firms do not internalize training and incorporate new practices into their strategic planning.

- The needs of the private sector are unclear, and updates do not adequately support the sector.

3.3 Mitigation

- The consultant shall include a needs assessment plan in their inception report to support the identification of the training proposed. This needs-assessment will be informed by stakeholder consultation of firms, current ProNET trainers and National BSOs who have leveraged this training over the years.
- Firms will undergo a post-training assessment to assess the impact of courses.

4. SCOPE OF WORK

4.1 Specific Activities

Caribbean Export is seeking the professional services of a consultant/team to update and design a new ProNET suite of modules aimed at enhancing private sector capacity building within CARIFORUM countries. The updated program will be integrated into the Caribbean Export's eLearning platform, hosted on the Caribbean Digital Transformation Institute (CDTI), powered by Velsoft.

To achieve the objectives of this consultancy, the consultant will be required to undertake the following specific activities:

- Comprehensive Review of Current ProNET Courses
Conduct a thorough review of the existing ProNET suite of courses to identify key areas that require updates, particularly in response to global business trends. This review should include an assessment of the effectiveness of current modules and areas where new content may be necessary.
- Design and Develop Updated ProNET Program
Create an updated ProNET program that encompasses revised and newly developed modules, aligned with the objectives outlined in Section 2 of this Terms of Reference. The new program should be forward-looking, incorporating the latest industry best practices and emerging business needs within the Caribbean region.
- Digitisation and Integration of the ProNET Program
Convert the updated ProNET modules into a digital format that is compatible with the Caribbean Export's eLearning platform, hosted by the CDTI on Velsoft. This process will include ensuring that the digital content is interactive, user-friendly, and accessible to a broad range of SMEs across the region.

- **Reporting and Documentation**

Prepare and submit detailed reports at each stage of the consultancy, including a final report that outlines the updates made, the new modules developed, and the process of digitization. These reports should provide a clear record of the work completed and recommendations for future updates and enhancements.

5. PROJECT MANAGEMENT AND REPORTING

5.1 Responsible Body

Caribbean Export Development Agency

5.2 Management structure

The Executive Director will retain overall responsibility for the overall project. Day-to-day supervision of this specific programme is the responsibility of the Manager (Ag.), Competitiveness and Export Promotion, who will communicate progress to the Executive Director.

5.3 Reporting

A monthly progress report outlining key activities undertaken, progress made, and results achieved, must be submitted to Mrs. Natasha Edwin-Walcott Manager (Ag.), Competitiveness and Export Promotion and copied to pronet@carib-export.com.

6. LOGISTICS AND TIMING

6.1 Commencement date and period of implementation of tasks

This consultancy is expected to commence on November 1, 2024 until April 2025 for a 6-month period.

7. PAYMENT TERMS

All services must be completed to the satisfaction of the Agency and payments will be contingent on submission and approval of the progress report and appropriate invoice. Payments will be made in accordance with the terms and conditions outlined in the contract between the contracting authority and the consultant.

The following payment terms are proposed:

- Upon presentation and acceptance of Report 1, 20% of the total cost will be paid
- Upon presentation and acceptance of Report 2, 30% of the total cost will be paid
- Upon presentation and acceptance of Report 3, 30% of the total cost will be paid
- Upon presentation and acceptance of Report 4, 20% of the total cost will be paid

8. REQUIREMENTS

8.1 Qualifications

- A post-graduate degree in International Trade, International Business, Business Administration, Entrepreneurship, or a related field.
- Demonstrated experience developing training curricula, including workshop, presentations, and training exercises.
- Demonstrated strengths and experience in developing the capacity of SMEs, preferably in the context of island nations.
- Prior work experience in the Caribbean region, especially with SMEs is required.
- Demonstrated experience in digitising content, developing online learning modules, and utilizing digital platforms to enhance training delivery and engagement, including experience with virtual workshops, e-learning tools, and digital resource creation.
- Fluent in English, however ability to speak Spanish, French and/or Dutch would be an asset.

8.2 Work Experience

- At least 7 years of relevant professional experience.

8.3 Required Documentation.

- Technical proposal/concept design for delivery of services requested
- Financial proposal in Euro to meet scope of works
- Applicant Declaration form in paragraph 14

Required documentation should be submitted to pronet@carib-export.com with a copy to Mrs. Natasha Edwin- Walcott, Manager (Ag.) - Competitiveness and Export Promotion at nwalcott@carib-export.com **no later than 4:30 pm AST on October 11, 2024.**

8.4 Office Accommodation

N/A

8.5 Facilities to be provided by the Consultant

N/A

8.6 Equipment

The consultant is expected to utilise resources to ensure the adequate fulfilment of the scope of services.

8.7 Travel

Travel is not anticipated for this project.

9. REPORTS

9.1 Reporting requirements

- An Inception Report (Report 1) that includes a proposed project design and work plan, as well as timelines, to be presented within 10 working days of the commencement of the consultancy. Prior to the submission of the Inception Report and the commencement of the contract, the consultant will be required to attend an inception meeting (meeting to be conducted virtually if the consultant is not present in Barbados) with the Caribbean Export team.

The Inception Report shall include:

- How the consultancy shall be conducted
- Any issues or possible risks and remedies or mitigating actions that will be undertaken
- Timelines for actions to ensure proper execution of the consultancy
- A Progress Report (Report 2), to be submitted to Caribbean Export. This report shall include information on:
 - Revision of ProNET's current suite of courses.
 - The development of updated ProNET modules.
- A Progress Report (Report 3), to be submitted to Caribbean Export. The consultant shall submit a comprehensive Progress Report to Caribbean Export, detailing the final ProNET training program that will be offered on Caribbean Export's e-learning platform, hosted by the CDTI on Velsoft. This report should include, at a minimum:
 1. A complete outline of the updated ProNET training program, including all modules and their corresponding objectives.
 2. Detailed content for each training module, covering topics such as training material, handouts, case studies, interactive exercises, and any other relevant content.
 3. Presentation slides and visual aids designed for the e-learning format.
 4. All supporting documents, resources, and tools that will facilitate the learning experience for participants.
 5. An overview of the digitisation process, including how the content has been adapted for the e-learning platform to ensure user engagement and accessibility.

- One (1) Final report which builds on the foregoing reports, activities undertaken, identifies lessons learned from implementation and makes recommendations on the scope of works and deliverables.

9.2 Submission and Approval of Reports

The reports and deliverables as referred to above must be submitted to the Manager (Ag.) Competitiveness and Export Promotion. All reports must be submitted in English in electronic format. The Manager (Ag.) - Competitiveness and Export Promotion is responsible for approving the reports.

10. EXCLUSION CRITERIA

Candidates will be excluded from participation in the bidding process if they:

- a) are bankrupt, insolvent, filing for insolvency or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) are the subject of proceedings for fraud, corruption, a declaration of bankruptcy, for winding-up, for administration by the courts, for an arrangement with creditors or for any similar procedure provided for in national legislation or regulations;
- c) have been convicted of an offence concerning professional conduct by a judgement which has the force of *res judicata*
- d) are guilty of grave professional misconduct proven by any means which Caribbean Export can justify;
- e) are guilty of serious misrepresentation in supplying the information required by the contracting authorities as a condition of participation in the procurement process; they have been declared to be in serious breach of contract for failure to comply with obligations in connection with another contract with the same Contracting Authority or another contract financed with Caribbean Export's funds;
- f) are in breach of payment of taxes or social security contributions;
- g) have been convicted or are the subject of proceedings for money laundering, terrorist offences or activities, child labour, human trafficking, being a criminal enterprise in the production of goods and services, or any other irregularity;
- h) are established as or operating as a shell company.

Any entity operating in public interest such as public health or environmental protection are also subject to the above clauses.

11. MONITORING AND EVALUATION

The Consultancy will be monitored and evaluated by Caribbean Export over the duration of the project. Performance on the project will be measured by satisfactory completion and timely submission of the deliverables outlined in Section 4 and 9, and as outlined within the work plan submitted in the inception report. Feedback, other than acceptance, on each submitted deliverable is not a requirement for the continuation of the project. However, in some instances the Consultant may need to integrate any feedback into the subsequent deliverables. The Contracting Authority will provide feedback to the consultant within ten (10) working days of receipt of the final report.

12. SPECIAL REQUIREMENTS

N/A

13. PUBLICATION OF INFORMATION

To participate in any activity executed or supported by Caribbean Export, you hereby agree that any information and personal data that you share and is collected by the Agency will be processed for the purpose of reporting the outcomes and impact of your projects and/or participation. Please note that Caribbean Export reserves the right to publish the Contractor's/Participant's name and address, the purpose and nature of the activity, and financial arrangements, in accordance with Caribbean Export's Personal Data Protection Policy. [Personal Data Protection Policy](https://content.carib-export.com/download/personal-data-protection-policy/). (<https://content.carib-export.com/download/personal-data-protection-policy/>) . Derogation from publication of this information may be granted if it could endanger the Contractor/Participant or harm his/her commercial interests.

14. DECLARATION

To participate in any procurement undertaken by Caribbean Export, all applicants must complete and submit to the agency the Applicant Declaration Form. <https://content.carib-export.com/download/applicant-declaration-form/>

All queries relating to this activity should be directed to pronet@carib-export.com.