



## TERMS OF REFERENCE

### CONSULTANCY SERVICES: SECURING THE PARTICIPATION OF INVESTOR LEADS AT THE CARIBBEAN INVESTMENT FORUM IN DUBAI IN MARCH 2022

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#### 1. BACKGROUND AND PROJECT DESCRIPTION

On 22 March 2022, the Caribbean Export Development Agency (Caribbean Export) in collaboration with the Caribbean Association of Investment Promotion Agencies (CAIPA), will be hosting a Caribbean Investment Forum in Dubai on the fringes of Expo Dubai 2020.

The hosting of the Forum will serve to:

- Generate investment into priority sectors in the Caribbean;
- Build partnerships with key business entities, that can be sustained over time;
- Promote the Caribbean as a place for investment;
- Showcase opportunities/areas for investment;
- Showcase successful Emirati investment in the Caribbean;
- Engage potential investors and financing institutions in discussing their interest and requirements for investing in the opportunities;
- Pitch specific ventures to specific investors;
- Increase the Caribbean's insertion into the Emirati society through the creation of links with journals, newsletters and key influencers and networks in that society; and
- Work towards attaining the sustainable development goals focused on no poverty, zero hunger, good health and well-being, decent work and economic growth, life on land and partnerships.

To secure the participation of key stakeholders and attract potential investors and clients desirous of doing business in the Caribbean, the services of an investor lead generation firm will be engaged.

Focus for this event will be placed on the following key sectors in the Caribbean: AgTech, Hotel and Resort Development, Fintech, Logistics and Transportation.

## **2. OBJECTIVE(S) OF THE CONSULTANCY**

The general objective of this assignment is the generation of registration, investor leads and meetings, as well as management of the Caribbean Investment Forum in Dubai in March 2022. This consultancy also seeks to secure long-term partnerships in the Middle East that will assist in sustaining the investment promotion effort of Caribbean Export and CAIPA.

## **3. SCOPE OF SERVICES**

The consultant is expected to deliver the following results:

- a. Registration Generation:** The generation of 300 delegate registrations (that is, investor leads, partners, influencers, media, among others) for the Caribbean Investment Forum 2022 in Dubai. It is anticipated that 150 delegates will participate in the event.
- b. Development of an event landing page -** The consultant/firm is required to develop an event page that provides information on speakers, sponsors and investment opportunities in the Caribbean. The consultant/firm is also expected to develop and implement a multipronged promotional strategy for the event (with a priority focus on digital promotion) that includes promotion of the Caribbean and CAIPA members as a destination of choice for investment. (Of note, the languages for the landing page will be English and Arabic).
- c. Investor Lead Generation:** The identification and profiling of 15 qualified leads with whom special meetings will be held during the conference and/or during the Dubai mission. Of note, 5 of these qualified leads should be potential investors interested in investing in the Haiti/Dominican Republic Border Zone Projects. A catalogue of investment opportunities in the Caribbean will be provided to potential investors to support the investor lead generation process.
- d. Resource mobilisation meetings:** The identification and scheduling of at least 2 meetings with government or private sector entities to discuss partnerships for the sustainable development of the Caribbean. The aim of Caribbean Export is to build the resilience of the private sector in the Caribbean. The identification and establishment of collaborative ties with partners in the UAE with similar developmental goals is the main objective of this deliverable.



- e. **Support for the signing of a Memorandum of Understanding (MOU) with a Dubai Chamber:** Provide support in identifying and securing an agreement for partnership with a Chamber of Commerce or a business and industry association in Dubai.
- f. **Securing of an Event location:** Provide support in identifying and securing a suitable location for the event.
- g. **Support in securing interpretation (From English to Arabic):** Provide support in the identification and contracting of interpreters/interpretation equipment for the day of the event (if deemed necessary).
- h. **Post event promotion and feedback:** The sharing of content on social media with images and videos for a period of 1 month after the hosting of the event. Provision of a final report that includes feedback on the pre and post event promotional campaign, as well as feedback on the event/meetings from delegates, an analysis of the attendees, and recommendations.

#### 4. **METHODOLOGY**

The Consultant/Firm will be required to work closely with the Snr. Advisor, Investment Promotion within Caribbean Export. The consultant/firm may also be required to interface directly with the Investment Promotion Agencies in the Caribbean.

#### 5. **DELIVERABLES and REPORTING REQUIREMENTS**

The deliverables to be submitted by the consultant are as follows:

- Report 1: A summary of the promotional and targeting strategy for the event, the proposed wire frame for the event website and a list of 300 potential delegates who will be targeted for the event, 2 options for locations to host the event with recommendations, and suggestions re interpretation.
- Report 2: Delivery and operationalization of the event website. Profile of the 15 investor leads, a meeting schedule for these targets with CAIPA members/the CAIPA Secretariat. In addition, this report shall contain information on the resource mobilization leads, as well as the MOU with a Chamber in Dubai; and
- Report 3: Final report with feedback on the promotional campaign, the event and recommendations.



## **6. TERMS OF PAYMENT**

- Upon presentation and acceptance of Report 1, 30% of the total cost will be paid;
- Upon presentation and acceptance of Report 2, 40% of the total cost will be paid; and
- Upon presentation and acceptance of Report 3, 30% of the total cost will be paid.

## **7. QUALIFICATIONS AND EXPERIENCE:**

- Experience in managing similar events (Please provide some evidence of at least 2 events that have been executed in the past 3 years);
- Experience in generating investor leads, pre-qualifying investors and securing the participation of potential investors in meetings and events to discuss investment opportunities (Please provide evidence of at least 2 investor lead generation exercises executed in the past 3 years);
- Experience in marketing and public relations, with a particular focus on location marketing;
- Experience in website development (Please provide evidence of at least 2 event websites that have been developed in the past 3 years);
- Experience working in and/or with the UAE market; and
- Experience working with Caribbean investment promotion agencies would be an asset.

## **8. CLIENT'S INPUT AND COUNTERPART PERSONNEL**

Office accommodation will not be provided by the Executing Agency. The Consultant/Firm will be responsible for its own expenses related to in-market research and business matchmaking.

## **9. MONITORING AND EVALUATION**

Performance on this assignment will be measured by timely and pertinent submission of completed deliverables outlined in Section 5 above that meet or exceed the expectations of the Executing Agency. Feedback on each submitted deliverable is not a requirement for the continuation of the project, however, comments will be provided in a timely manner.

## 10. SPECIAL REQUIREMENTS AND EVALUATION

A **technical and financial proposal** in **EUROS** is to be presented electronically to Suzette Hudson at: [shudson@carib-export.com](mailto:shudson@carib-export.com), copied to Damie Sinanan at: [dsinanan@carib-export.com](mailto:dsinanan@carib-export.com). The technical proposal shall provide information on section 7 above. The deadline for submission is: **17 December 2021 by 4:30 pm AST.**