## **ANNEX A**

## **REGIONAL**

## **Competitiveness and Innovation Division (IFD/CTI)**

## **Analysis of Technological Extension Services in the Caribbean**

## **RG-X1246**

**TERMS OF REFERENCE**

1. **Background and Justification**
   1. Established in 1959, the Inter-American Development Bank (“IDB” or “Bank”) is the main source of financing for economic, social and institutional development in Latin America and the Caribbean. It provides loans, grants, guarantees, policy advice and technical assistance to the public and private sectors of its borrowing countries.
   2. The IDB has been analyzing the role of policies and programs aimed at delivering Technological Extension Services (TES) in Latin America yet, outside of a few reviews conducted on agricultural extensions program, there has been no study assessing an expanded scope of TES in the Caribbean region. TES is defined as those services supporting the diffusion, extension, and absorption of technology in firms. TES represents an alternative for improving productivity and performance in markets and global value chains. The development of TES can help bring firms from the region closer to the technological frontier by exposing firms to existing technologies already tested in other countries that can assist them with improving their productivity and, by extension, their competitiveness in global markets.
   3. Considering the proven impact that technological extension services and policies have in galvanizing the productivity of firms, and the importance of enhancing firm-level productivity in the Caribbean region, the Bank wants to identify opportunities for TES. In the last few years, the region has been making small advances in the design and execution of STI policies as evidenced by the establishment of CARICOM’s Caribbean Council of Science and Technology (CCST) and the endorsement of their corresponding regional policy framework for STI, but there remains a large gap in both knowledge of the existence of TES and of how the private sector can benefit from participation in this relatively new thematic area for the region.
2. **Objectives**
   1. The general objective of the consultancy is to conduct a landscape analysis on the current supply and potential demand for technological extension services in the Caribbean region in order to identify potential opportunities to develop TES programs. The specific objectives of the consultancy are to (i) develop a regional diagnostic of TES in the Caribbean region with in depth focus on four countries in the Caribbean (Barbados, Belize, Jamaica, and St. Lucia) using the framework of applying four main pillars – institutional capacity, instruments and mechanisms for assisting companies, human capital capacity, and technological capacity within the countries, (ii) identify sectors where TES services could impact productivity; and (iii) recommend the main lines of action the Compete Caribbean Partnership Facility can take to design an initiative to strengthen TES in the Caribbean region, including the potential design of a regional network surrounding this theme.
3. **Scope of Services**
   1. The scope of services includes the following:
4. Review the current supply of TES in various productive sectors of the selected economies and the potential demand for services of this kind.
5. Carry out an analysis on the possibility to develop TES in the selected countries based on the following four main pillars
6. Institutional capacity to manage a system to provide different services (instruments) directly to support private sector;
7. Services (instruments) and mechanisms that could be provided to assist enterprises, especially SMEs;
8. Presence of human capital needed to carry out the processes of technological transfer required by companies;
9. Technological capabilities installed to carry out the required transfer processes by companies from different economic sectors.
10. Assess potential opportunities where TES could address climate change adaptation or climate change mitigation objectives in the region.
11. Examine the unmet needs and challenges of women led firms that could be addressed through TES offerings.
12. Identify the principal lines of action that could be recommended to improve the current level of TES, taking in consideration the main barriers, different types of TES, incentives to increase TES supply and demand, including what features to incorporate into a TES program that can serve the needs of female owned firms.
13. Analyse the context for implementing TES at the regional level.
14. Presentation at a regional event in the Caribbean at a date and place to be identified.
15. **Key Activities**
    1. The consultant will carry out the following key activities that will facilitate the achievement of the consultancy:
       1. Prepare an initial report that proposes the Work Plan and the Methodology to be used
       2. Carry out a mission (visit) to gather information from the selected four countries (Barbados, Belize, Jamaica, and St. Lucia). These four countries were selected based on the geographical spread and existing TES capacity as evidence by past EST implementation.
       3. Prepare a preliminary report to be submitted to the IDB
       4. Prepare a final report incorporating the comments and discussions with the IDB team
       5. Develop a PowerPoint presentation that summarizes the main findings of the study
16. **Expected Outcome and Deliverables**
    1. The expected products under this consultancy are the following:
       1. Initial Report: report should include the Work Plan (including travel schedule) and the Methodology (including the interview questions and list of interviewees)
       2. Preliminary Report: The report should include a regional analysis of TES in the Caribbean utilizing the specific cases of four selected countries to provide robustness to the analysis. The analysis should respond to the queries listed in section and recommendations for creating/improving the TES in the region.
       3. Final Report: a final report which incorporate the comments from the IDB
       4. PowerPoint: PPT summarizing the main findings of the research and proposed recommendations
       5. Presentation: to be conducted at a regional event in the Caribbean at a date and place to be defined
17. **Supervision and Reporting**
    1. The technical responsibilities of this project will be coordinated by Sylvia Dohnert, Private Sector Development Lead Specialist and Michael Hennessey, Private Sector Development Specialist, of the Innovation and Competitiveness Division (IFD/CTI).
18. **Schedule of Payments**
    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.

|  |  |
| --- | --- |
| **Payment Schedule** | |
| **Deliverable** | **%** |
| 1. Signing of the Contract | 25% |
| 1. Submission of the Preliminary Report | 25% |
| 1. Submission of the Final Report | 50% |
| **TOTAL** | 100% |

**Qualifications**

* **Academic Degree / Level & Years of Professional Work Experience:** Minimum of a Master’s degree in Economics, law, sciences and any other discipline that is relevant a keen understanding of competition policy and broadband.
* **Experience in:** At least fifteen years of experience in the design, management, and evaluation of program and policies for the promotion of competitiveness, economic development, innovation, and/or technological management. Extensive experience in institutions similar to those benefited by this consultancy or relevant in their functions.
* In-depth knowledge and understanding of the science, technology, and innovation, including strategies and governance structures in the LAC (Latin America and the Caribbean) region;
* Experience working in the Caribbean is a plus.
* Proven project work at international, national and local levels; Experience with processing large amounts of information and synthesizing it in an understandable fashion to decision-makers and wider audiences.
* **Other Skills:** The position requires an individual with proven analytical and research experience and knowledge of innovation and competitiveness, with specific expertise the design and implementation of technological extension services and/or manufacturing extensions services.

**Core Competencies**

* Highly developed communication skills, including the preparation of high quality reports and the delivery of presentations;
* 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;
* Cultural awareness and sensitivity to country specific issues;
* Fluency in oral and written English.

**Characteristics of the Consultancy**

* Consultancy category and modality: International Products and External Services Contractual, Lump Sum
* Contract duration: Six (6) months from the start date including 70 non-continuous working days.
* Place(s) of work: External consultancy which will be developed at the place of residence of the contractual. Two missions to a location to be determined. One final presentation in a place and date to be determined.

**Payment and Conditions:** Compensation will be determined in accordance with Bank’s policies and procedures. In addition, candidates must be citizens of an IDB member country.

**Consanguinity:** Pursuant to applicable Bank policy, candidates with relatives (including the fourth degree of consanguinity and the second degree of affinity, including spouse) working for the Bank as staff members or Complementary Workforce contractual, will not be eligible to provide services for the Bank.

**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, religion, and HIV/AIDs status. We encourage women, Afro-descendants and persons of indigenous origins to apply.

**1.2 Expert Policy Dialogue Facilitator**

**TERMS OF REFERENCE**

**OBJECTIVE**

The purpose of the consultancy is to support the IDB in designing and executing a participatory workshop that will lead its high level participants in designing hypothetical strategies for implementing TES in the region. The workshop will take place within a Science, Technology and Innovation regional policy dialogue in the Caribbean taking place in Jamaica during the summer of 2017.

**ACTIVITIES**

1. The consultant will support the IDB in designing an interactive and participatory workshop on technological extension services that will facilitate a process of collective analysis, reflection, and learning among its participants.
2. In addition to explaining the basic concepts of TES, the workshop should blend the use of real Caribbean case studies and hypothetical situations that require the participants to develop practical, innovative solutions for applying TES to the problem. As such, the consultant will develop a case studies of specific problems that are reflective of the contextual realities of the Caribbean region. The case studies should be presented to the Compete Caribbean Team and discussed prior to delivery. The consultant will make recommendations according to best practices.
3. The consultant is expected to moderate the workshop and to structure the workshop in such a manner that inspires consensus building that will embolden key figures to prioritize movement towards implementation.

**DELIVERABLES**

1. The consultant will attend all meetings (teleconference and videoconference) related to the planning and design of the workshop. The consultant is required to support the development of the agenda for the workshop.
2. A selection of case studies with accompanying PPT presentation
3. The summary report will consist of a qualitative analysis based on observation and interaction with participants to ascertain the workshop’s effectiveness, in particular knowledge uptake, participant engagement and ability to apply concepts learned, and an overall receptivity of implementing TES in their respective countries through identification of needs for the model.

**Means of Payment:**

30% at contract signature

20% at the submission and acceptance of the case studies and PPT presentation and agenda for the workshop

50% upon successfully moderating the policy dialogues and acceptance of the summary report

**COORDINATION**

The technical responsibilities of this project will be coordinated by Sylvia Dohnert, Private Sector Development Lead Specialist and Michael Hennessey, Private Sector Development Specialist, of the Innovation and Competitiveness Division (IFD/CTI).

**CHARACTERISTICS OF THE CONSULTANCY**

**Type of consultancy:** Individual Consultancy with a lump sum contract that includes all expenses.

**Duration:** 2 months

**Place of work:** Consultant’s place of work. 3 days travel to the Caribbean for the policy dialogue will be required. Videoconferences and teleconferences are expected.

**Qualifications:**

 Academic Degree/level and years of professional experience: A minimum of a Master’s degree in Economics, Public Policy, Science and Technology, Innovation or a similar field. At least 10 years of experience in conducting assessments reports of a similar nature. PhD preferable.

 An expert understanding of technological extension services as demonstrated by published articles and papers and public presentations.

 Experience with facilitating policy dialogues amongst high level participants and/or motivating audiences to action

 Knowledge of Latin America and the Caribbean would be an asset.

 Language: Fluency in written and spoken English is required.

**1.3 Communications and Research Support**

**TERMS OF REFERENCE**

**OBJECTIVE**

The purpose of the consultancy is to (i) provide analytical support to promoting TES in the region (ii) develop and implement a communication strategy to engage key stakeholders and (iii) evaluate the effectiveness of the RG-T2992 as it pertains to meetings its outcome of increasing knowledge of TES amongst key stakeholders in the Caribbean region.

**ACTIVITIES**

* Summarize technical documents to effectively communicate the benefits of TES via social media, blogs, articles, and other communication tools
* Support the dissemination of knowledge products related to technological extension services
* Coordinate and maintain close communication with Country Offices and the IDB’s External Relations to reach out to key stakeholders.
* Coordinate all communications and media activities related to this TC
* Maintain a database of stakeholders across the CARICOM region
* Design data collection tools to use in the assessment of the technical cooperation’s effectiveness in meeting its outcomes. For example, the development of a survey design complemented by interviews or observations of key stakeholders.
* Provide other support as required including event coordination

**DELIVERABLS**

1. **Communication Strategy:** Develop and implement a communication strategy promoting TES among key stakeholders. This output should include the development of an audience matrix identifying key stakeholders, their motivations, and the best communication tools for encouraging the buy-in of these stakeholders. The consultancy is also expected to collaborate in content development for the initiative’s webpage, social media, and blog, including writing blog posts on technological extension services that are targeted to the identified audience.
2. **Summary Report**: Develop a summary report that utilizes qualitative and quantitative data to ascertain the technical cooperation’s effectiveness (RG-T2992), in particular knowledge uptake, participant engagement and ability to apply concepts learned, and an overall receptivity of implementing TES in their respective countries.

**COORDINATION**

The technical responsibilities of this project will be coordinated by Sylvia Dohnert, Private Sector Development Lead Specialist and Michael Hennessey, Private Sector Development Specialist, of the Innovation and Competitiveness Division (IFD/CTI).

**CHARACTERISTICS OF THE CONSULTANCY**

**Type of consultancy:** Temporary Term Contractual, Monthly

**Duration:** 6 months

**Place of work:** Barbados

**Qualifications:**

* Academic Degree/level and years of professional experience: A minimum of a Bachelor’s degree in Economics, International Affairs, or a similar field with at least 2 years of experience working with an international organization in conducting research, coordinating events, and communicating with key stakeholders.
* Excellent writing and communication capabilities.
* Strong knowledge of social media platforms
* Ability to read, succinctly summarize, and organize technical documents
* Skills: Strategic thinking; strong communication skills; meeting commitments and deadlines; lead and coordinate work effectively with key stakeholders
* Team mindset
* Experience in planning, organizing, and executing projects.
* Knowledge of Latin America and the Caribbean and the private sector landscape
* Language: Fluency in written and spoken English is required.