



## **Terms of Reference for international visit**

**Project/Programme Title: “Sustaining Economic Recovery for Peace” (SERP)**

Country: Ukraine, (implemented in Odesa, Bilhorod-Dnistrovsky and Izmail)

Duration of project: 01.12.2016 – 30.11.2019

Name of Partner Organisation: International Charitable Foundation (ICF) Caritas Ukraine

### **1. Introduction.**

International Charitable Foundation “Caritas Ukraine” calls for tender bids to conduct 2 (two) international exchange visits for 12 Acceleration program participants (6 and 6) in the framework of the Project «Sustaining Economic Recovery for Peace» (SERP) executed by ICF Caritas Ukraine, together with Caritas Odesa UGCC. The Visits should be in conducted in January and should preferably last for 3 days.

The project is funded by Austrian Development Cooperation (ADA).

The selected company will be contracted by Caritas Ukraine and shall conduct 2 international exchange visits.

### **2. Background**

The International Charitable Foundation “Caritas Ukraine” calls for tender bids to conduct 2 (two) international exchange visits for the Project **Sustaining Economic Recovery for Peace** (SERP), which has been implemented in three cities in Ukraine: Odesa, Bilhorod-Dnistrovsky and Izmail.

The project is being executed by ICF Caritas Ukraine. To realize the main project activities related to business education, the implementing agency has cooperated with selected business schools and business experts.

The project with a budget volume of EUR 550.000 is funded by Austrian Development Cooperation (ADA: EUR 500.000) and Caritas Austria (EUR 50.000).

The selected company or group of experts will be contracted by ICF Caritas Ukraine under the legislation of Ukraine.

#### **Project goals:**

The project’s aim is to contribute to the regional prosperity of Odesa oblast by providing equitable access to employment opportunities for 2,040 job-seekers and increased capacity for entrepreneurial skills for 525 potential entrepreneurs to achieve sustainable income and improve community cohesion. The project targets both Internally Displaced People (IDP) and the local population and has a geographic focus on the cities of Odesa, Bilhorod-Dnistrovskyi and Izmail.

#### **The expected outcome of the programme is:**

IDPs and local population in Odesa oblast have increased equitable access to employment opportunities and increased capacity for entrepreneurial skills to achieve sustainable incomes and improved community cohesion.

***In order to achieve this outcome the following outputs will be delivered by the programme:***

Result 1. A user-friendly portal is created and functional to provide the unemployed local and displaced population with information about employment trends and employment services by government departments and NGOs.

Result 2. Individual counselling services (Case management) are provided to 2040 unemployed local and displaced job-seekers in the cities of Odesa, Bilhorod-Dnistrovskyi and Izmail .

Result 3. 7 Business incubation and 7 acceleration programs are organised for potential entrepreneurs in the cities of Odesa, Bilhorod-Dnistrovskyi and Izmail

Result 4. 88 financial grants are awarded through a competitive selection process to first time and existing entrepreneurs who successfully attended incubation and acceleration sessions.

### **Project activities:**

The project combines the expertise and knowledge of the two project partners (Caritas Ukraine, Caritas Odesa) and offers a perspective to future employees and self-employers. The project offers a combination of individual services of case-management for job-seekers drawing on the successful experience of Caritas Odesa in the sector, and, based on the best practices of Caritas Ukraine in business development, involving local and national experts. It provides tailored incubation and acceleration programmes for potential entrepreneurs with a special focus on four business sectors (IT/E-commerce, Agriculture, Tourism, Social business), coupled by grants awarded on a competitive basis and activities that encourage IDPs and local communities to work together.

### **Context of intervention:**

The main challenge that the project addressed is related to the integration of internally displaced people from the conflict affected areas in the Donbas and from Crimea. Integration challenges are mostly linked to economic integration: Given the increasing levels of unemployment and economic recession, local communities fear competition of IDPs for the same resources and opportunities. The experience of the applicant and local partners in working both with local and IDPs communities leads to undertaking an approach towards fostering integration that will target both IDPs and local population and will pass through improving employability of unemployed job-seekers as well as increasing the capacities of entrepreneurs to generate income and become sustainable.

The beneficiaries of the project are unemployed IDPs and local citizens with an average ratio of 60% being IDPs and 40% members of host communities. A total of 2,040 job-seekers will be selected for Expected Output 2 (case management) and 525 potential and existing entrepreneurs will be selected for Expected Output 3 (incubation and acceleration programmes).

## **3. Purpose**

The purpose of the exchange visits is for small entrepreneurs to improve their entrepreneurial skills and identify new business opportunities. The project is aimed at owners of socially-oriented businesses and businesses with significant social impact; social entrepreneurs.

The main goals of the visits are to get acquainted with successful representatives of businesses and social entrepreneurship of a European city, to obtain consultations of expert practitioners on possible solutions for the challenges that Ukrainian entrepreneurs experience, to explore the possibilities of expanding and scaling up one's business, and to learn from the successful experience of local organizations and foundations.

Beneficiaries of the project are selected participants of the acceleration program of the SERP project. At least 12 entrepreneurs will be selected for participation in 2 trips (6+6) based on the following criteria:

- relevance of their entrepreneurial activity to the agenda of the trip;
- social and / or environmental impact of their business;

- financial sustainability of the business project or operating company.

#### **4. Objective**

Contractor companies are asked:

To develop a travel program including the following items:

- Logistics: trip by plane, organisation of accommodation in a hotel, convenient hotel location, meals (breakfast, lunch, dinner), transport in the city, visits;
- Help to organize excursions to enterprises and / or projects in accordance with the business activities of the participants (minimum 6 visits per 1 trip according to participants' business interests);
- consultations with entrepreneurs and project managers;
- round tables, discussions on the challenges that entrepreneurs face and how they can be addressed;
- meetings with organizations, foundations and opinion leaders to find new opportunities, niches and business vectors;
- engagement of successful entrepreneurs and project managers to contribute to the visit;
- evaluation of the the impact of the visit on participants' entrepreneurial activities;
- organizing leisure activities, city tour, if time allows;
- translation services.

During the training, all participants will meet with owners and managers of enterprises and projects. During the trip, participants should improve their project management skills, financial analysis, marketing, communication with partners, customers, communities, other stakeholders, etc.

Each participant will submit a narrative report after the trip on what they have learnt during the visit and how they plan to apply that in their further entrepreneurial activities.

#### **5. Subject and Focus**

##### **Identifying the problem**

Entrepreneurs in Ukraine are often closed in a vicious circle trying to deal with difficult economic, marketing and financial issues. Therefore, they do not pay always attention to the identification of competitive advantages and uniqueness of their business on the market, more efficient use of existing material and information resources and obtaining new opportunities. The reason for this is usually low awareness of business owners about regional and foreign business and experience of solving similar problems.

It is the lack of communication and the exchange of experience that results in considerable economic, marketing and financial losses for enterprises.

##### **Solution**

The main objective of the exchange visit is to extend the successful experience of international enterprises and projects through communication with the participants of the acceleration program from the SERP project. Through familiarization with new productive examples of entrepreneurial and social activities, as well as thorough consultation of expert practitioners, participants will have the opportunity and knowledge necessary for them to qualitatively improve, scaling up their businesses, as well as creating and improving their own niche on the local market.

#### **6. Tour Program**

During 3 days of their stay in an international city, participants must familiarize themselves with the main tendencies of commercial and social activity of enterprises and organizations. For this purpose

the following can be used: the formats of study tours, trainings with elements of discussion, targeted consultations of the experts and practitioners, etc.

Priorities are the following areas of the entrepreneurial activity:

- IT / e-commerce;
- social business;
- agriculture;
- tourism.

Communication with and learning from organizations, foundations and opinion leaders on international cooperation and communication will have a positive impact.

Not all entrepreneurs have visited the target city in the past, so organizing a city tour in free time will be an added benefit.

## **7. Expected Results**

After the trip, the quality improvement of the entrepreneurial activity of 12 participants is expected, effective communication with representatives of 10 international projects and enterprises, carrying out at least 2 general educational activity. It also needs to find realistic ways to introduce new methods of commercial and / or social activities of business participants, which will lead to more sustainable revenues and improve the cohesion of the community where the participants live.

A study visits to an international country is scheduled in January. The trips will last for 5 days, 3 of which will focus on training and familiarization with existing companies and projects in international city.

The main stages (to be filled in by the applicant):

Events	Date
Contents of the study visit	
Plan of the trip	
Additional Events	
Organization of logistics and accommodation of participants	
Determination of the results and influence on the entrepreneurial activity of the participants	

## **8. Qualifications for Successful Service**

Corporate competencies:

- Officially registered legal entity;
- At least 3 years of experience in consulting, developing, organizing and conducting training programs and technical assistance;
- Experience in developing, organizing and conducting training and technical assistance programs for the private sector;
- Experience with donor organizations and / or multinational or international organizations of the company;
- Manager qualification and experience;
- Bachelor or Master degree in economics, law or international relations;
- Experience in conducting local or regional projects;
- Experience of travel organization, purchase of tickets and booking of hotels;

- Appropriate experience and understanding of the context of local economic and political development, in particular regarding issues related to entrepreneurial activities of participants;
- Good proficiency in English; knowledge of Russian/Ukrainian will be an asset.
- Experience of conducting exchange visits in target city would be an advantage.

## **9. Documents to be included in the submission of proposals**

Companies submit the following documents:

- Certificate of business registration;
- Statement for positive results from three clients in connection with the value of the contract for the last 3 years;
- Pertaining documents of the assigned staff;
- Proposed plan and content of the study tour (visit program);
- Financial proposal.

The exchange visit is to be conducted with the support of an interpreter into Russian or Ukrainian. The application is filled in English and Ukrainian. Reports are provided in English and Ukrainian.

One week after the visits were conducted, the contractor will submit the following documentation:

- Finance report
- the final report

All documents and reports need to be written in English and Ukrainian.

## **10. Coordination and Responsibility**

The contractor will be supported by the national project manager and by the international delegate of Caritas Austria.

**The contact person is:** Ms. Valentyna Butkovska, Project Manager

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## **11. Submission of Offer**

The offer should be submitted within the indicated submission date November, 24, 19:00 Ukrainian time and should provide the following details in English:

- Experts' Proposal indicating time-wise engagement of expert team, description of experts' qualification,
- Information about professional background:
  - experts' curriculum vitae
  - at least three trips organized
  - at least three reference contacts
- Budget indicating fees per transport, accommodation, meals, events costs, training costs, envisaged travel costs for organizers, material costs if applicable, other costs. Please prepare the budget in Hryvnia (UAH) and EUR.

## 12. Appraisal of Offers

The offers will be assessed according to the following criteria:

- Quality and price of offer
- Availability of experts in the suggested time period

→ **Please note that only offers will be respected that have been submitted timely and with the full set of requested documents**