

Terms of Reference

Appointment of Contractor(s) to carry out

(a) Interim Evaluation and delivery model review for the InterTradelreland – INNOVATION BOOST PROGRAMME

AND

(b) Economic Appraisal of the InterTradelreland Innovation Boost Phase VII Programme

Introduction

InterTradelreland is the All-Island Trade and Business Development Body, one of six North South Implementation Bodies established under the Good Friday Agreement. In this capacity it acts as the All-island Economic Development Agency. It is funded by the Department of Enterprise, Trade and Employment (DETE) in Ireland and the Department for the Economy (DfE) in Northern Ireland.

InterTradelreland is the only organisation that has been given responsibility by both governments to boost North-South economic cooperation to the mutual benefit of Ireland and Northern Ireland.

The agency's remit is to 'exchange information and coordinate work on trade, business development and related matters, in areas where the two administrations specifically agree it would be in their mutual interest.

InterTradelreland achieves its legislative remit through several means, including:

- Connecting and helping businesses across the island to trade cross-border, collaborate, innovate and attract investment.
- Business and economic research which provides insight and foresight for policy makers and a robust evidence base to design initiatives that support businesses.
- Collaboration with stakeholders across the island to fulfil its unique role to accelerate economic growth through identification and delivery of shared policy priorities in both jurisdictions.

InterTradelreland's Corporate Plan 2023 – 2025 outlines the agency's ambition:

Vision: A globally competitive all island business ecosystem that advances both economies

Mission: To provide leadership, advice, and support to maximise export growth opportunities through greater Cross-Border collaboration, innovation, entrepreneurship, and trade.

InterTradelreland's strategic priorities are aligned to the economic and enterprise policy priorities pursued by its Sponsor/Partner departments in areas such as innovation, decarbonisation, and boosting productivity among SMEs.

Background

The InterTradelreland Innovation Boost Programme (formally FUSION) supports the development of businesses on the island of Ireland through the transfer and embedding of knowledge on a cross-border basis between industry and academia. The programme works by developing 3-way partnerships and projects between:

- Companies: private sector businesses with science or technology-based development needs;
- Academia: third level institutes such as colleges, universities, technology or research centres; and
- Graduates: high-calibre degree/diploma holders.

Partnerships are driven by company need. Within each 3-way partnership the partners work collectively to develop and implement a solution to a new product / service development or process improvement need within the company.

Each company is partnered with an academic institute with specialist expertise in the area required. The academic institute provides one-to-one tailored technical assistance to the company's Innovation Boost Programme. A high-

calibre graduate/diploma holder is employed by the company to spearhead the project. This graduate operates as the link and agent for technology transfer from the academic institute into the company.

In essence, a dynamic and shared tri-partite partnership is formed between the company, the academic institute and the graduate, all working towards the target outcomes of the project.

Since February 2001 InterTradelreland has successfully completed Phase I (pilot), Phase II, Phase III and Phase IV & Phase V of FUSION. A rebranding exercise was carried out in 2019 and the current phase was renamed INNOVATION BOOST PROGRAMME.

The Innovation Boost Programme commenced on 1st January 2021 for a seven-year period. Recruitment of businesses to the Innovation Boost Programme for the first 5 years of the programme, with the remaining 2 years of the contract comprising the delivery of approved projects through to completion and no further recruitment of new companies onto the programme. The current programme end date is 31st December 2027 with a 2-year run out period for live projects.

The Innovation Boost Programme is the flagship programme within InterTradelreland's collaborative Innovation portfolio. The programme seeks to embed innovation capability within businesses through collaboration with knowledge centres and the development of graduates.

The primary strategic aim of Innovation Boost Programme is:

"To support the development of businesses on the island of Ireland by transferring and embedding knowledge on a cross-border basis between industry and academia."

This aim is met, in the main through the creation and delivery of 12/18 month project partnerships between:

- companies with technology-based needs;
- Knowledge Centres (on the opposite side of the border/jurisdiction from where the company is located); and
- high calibre graduates recruited on the open market.

The Innovation Boost Programme also delivers innovation audits of all eligible applicant businesses (i2i) and

- Business- to Business (B2B) projects; and in addition, piloted a new initiative: -
- Innovation Springboard capability development support.

The associated objectives of the programme are specifically to:

- Improve the flow of, and access to, knowledge capital across the island of Ireland;
- Increase technology diffusion across the island;
- Increase process and/or product development within business;
- Increase industry R&D capability and thereby improve business innovation;
- Improve industry-academic linkages and thereby improve the knowledge and skills base within SMEs and larger companies;
- Improve the graduate skills base and career progression for graduates (Business-Academic projects);
- Encourage a culture of collaboration and 'open' innovation; and
- Support the development of the all-island innovation ecosystem.

The Programme objectives of the Innovation Boost are:

- To conduct on average 140 'Innovation Boost Programme Audits' per annum (700 in total);
- To support at least 11 companies in year 1 and 66 companies thereafter to complete Innovation Springboard projects (i.e. 77 in total by end year 5);
- To develop and support sufficient partnerships (allowing for drop off) to ultimately complete:
- 73 x 12 month project partnerships;
- 146 x 18 month project partnerships; and
- 27 x 24 month Business-to-Business (B2B) projects.

These projects must be supported through to completion.

- Ensure that the projects are based in the two jurisdictions in proportion to the funding levels, currently two-thirds in Ireland and one-third in Northern Ireland, but subject to change;

- Ensure that approximately 75% of projects fall within the New Product/Service/Process Development category;
- Ensure that a minimum of 50% of participating SMEs have not participated on other Public Sector funded R&D Programmes with academia on a cross-border basis;
- Ensure that 80% of graduates agree that their participation on the Innovation Boost Programme has enhanced their skills and employability
- Achieve sustainable employment for a minimum of 65% of graduates within the participant businesses; and
- Generate a minimum return on investment of £6.30 in net additional sales for every £1 invested by ITI within 4 years of the final project being completed.

Management Structure

InterTradelreland completed a procurement exercise to appoint a Managing Agent for the Innovation Boost Programme. The contract commenced on 1st January 2021 for a five-year period, plus a further two years roll out.

Terms of Reference

(a) Interim Evaluation and delivery model review for the InterTradelreland – INNOVATION BOOST PROGRAMME

InterTradelreland has a requirement for consultancy services as follows;

1. To complete an interim assessment of the effectiveness of the current Phase VI Innovation Boost Programme and of the Managing Agent.
2. To undertake a robust assessment of the appropriateness of the current programme, delivery model and systems in the context of InterTradelreland's corporate strategy, Government policy North & South, and the wider all-island innovation ecosystem.
3. To provide an evidenced scoping of a potential redeveloped future focused delivery model taking consideration of and not be limited to the needs of; businesses, stakeholders, academics that considers a pathway that enables access to innovation supports. This should include but not be limited to assessment of levels of support, type of support provided, targeted vs actual support recipients (size/sector) and eligibility criteria.

The assignment should be undertaken in accordance with HMT and Better Business Cases NI guidance, and adhere to the following as a minimum:

Specific evaluation requirements include:

- Review the strategic context under which the programme operates and assess whether the strategic context under which the programme/is delivered remains valid.
- Review the operational fit of the programme in line with the objectives of InterTradelreland and its parent Departments and other relevant strategies.
- Examine the fit with other economic development programmes including whether the programme has given rise to any duplication with other programmes/activity operating in Ireland or NI.
- Review the performance of the current programme against the original objectives and SMART targets, and if appropriate, identify reasons for any divergence. Assessment of performance against objectives and targets should be verified and validated. Assess the appropriateness of the target setting methodology; and if appropriate, identify reasons for failure
- Allied to point above, assess the overall economic impact of the current programme, including the wider and regional economic benefits, direct and indirect, quantitative and qualitative, that have accrued as a result of the projects assisted through the programme, quantifying as many of these as possible.
- Assess the management and operating structure to determine how effective both,
 1. The managing agent team
 2. The InterTradelreland teamhave been in the management and delivery of the programme. Identify the main risks that emerged during the programme/project and any actions taken to reduce these.
- Conclude on the level of additionality/deadweight, displacement, economic efficiency, viability and cost-effectiveness.

Key Stages

The key stages in this evaluation will be as follows:

1. Effectiveness/Outcomes

Current programme uptake:

- Expected to include primary research that may include conducting surveys, interviews, and focus groups with representatives from the target groups (businesses, stakeholders, academics, graduates).

The focus should be on understanding:

- **Current Needs and pain points**, e.g., businesses may need funding but struggle with eligibility criteria.
 - **Desired Support Types**. Direct feedback on preferred support provision for example, through grants, mentoring, R&D facilities, or technical partnerships.
 - **Appropriateness / value of elements within the programme support** – to include but not limited to, innovation audit (i2i), Business to Business and Career Boost.
 - **Effectiveness of current delivery model**: Gather information on what aspects of the existing support model enables, is neutral, or obstructive.
 - **Innovation Barriers**: Identify regulatory, financial, or knowledge-based barriers that these groups currently face.
- Secondary research that may include reviewing existing literature, industry reports, case studies, and innovation policy to frame the broader landscape and identify established practices and challenges.
 - A review and assessment of the level of demand from businesses seeking to participate on the programme, academic partners wishing to participate on the programme and graduates seeking employment through the programme and also taking into consideration the current environment.
 - An assessment of appropriateness of the eligibility criteria for each of the partners involved in the process, namely, businesses, academia and graduates – with focus on whether these should be adjusted for future programme delivery.
 - A review of the programme's fit within the wider InterTradelreland Innovation and Entrepreneurship programme offering, identification of potential synergies or opportunities.
 - An assessment of a project timeline. To include a breakdown of;
 - Number of enquiries to the programme
 - Number of innovation audits analysis (completed/progressing/non-progressing/referrals to other programmes) and any cost implication (Figure: to date >528 completed)
 - Number of applications submitted and approved (Figure: to date >200)
 - Number of approved projects which do not commence or subsequently withdraw and the cost implications of these non-start/withdrawals to the programme (Figure to date: <60)
 - An analysis of the geographic spread (NI/Ireland) of all applications and
 - assessment of sectoral demand;
 - return on investment; and
 - the impacts delivered, to include qualitative and quantitative outputs/outcomes

Outcomes / Outputs

- To quantify the benefits against the key objectives of the programme as set out in the Economic Appraisal
- To assess any quantitative benefits/experiences not anticipated at the outset of the programme including those elements which really added value to all the beneficiaries, namely businesses, academia and graduates for example, how effectively Innovation Boost supported the business to sustain and/or grow during the Covid-19

pandemic, and how the support may or may not have positively or negatively influenced their business operation.

- To assess overall “value for money” issues including deadweight/additionality.
- To assess current and possible future impacts of the programme against InterTradelreland’s Key Performance Indicators.
- Capture and record other qualitative impacts reported by all participating beneficiaries.
- Analysis and identification of sectoral or generic cross border market information that emanates from projects that could/should be captured and made available to applicants/ beneficiaries and the wider SME sector.
- Compare all costs actually incurred in connection with management and delivery of the programme with those estimated at the outset and clearly explain any reasons for variances. A ‘full economic cost’ analysis must be undertaken. This must include the cost of graduate recruitment, marketing elements, evaluation costs, staff time, admin input, procurement costs, legal costs, etc. Better Business Cases NI guidance should be adhered to when developing and assessing costs and benefits, including guidance on assistance to the private sector.
- Assess the economy, efficiency, and effectiveness with which public funds have been used on the programme

2. Delivery Model

Programme Management

- An assessment of the effectiveness of the Managing Agent in managing and delivering the current programme, highlighting the following:
 - Programme delivery efficiency – timeline:
- Enquiry, innovation audit, preparation, and development to application submission
- Application approval to graduate commencement
- Commencement of project to completion, specifically relating to project extension requests and re-recruitment of graduate
 - A qualitative and quantitative assessment of the audit process for applicant businesses to provide guidance for any future supports
 - What aspects of the programme management structure, in relation to the Managing Agent and InterTradelreland team worked well and what aspects could be enhanced?
 - Recruitment – effectiveness and appropriateness of Career Boost to include promotion/attraction, process of appointment and retention of graduates to the programme from perspective of business, academia and graduates.
 - Is there anything that could have been done differently?
 - Did any unforeseen issues arise that affected the project management process?
 - How well were the risks managed?
 - Are there any remaining issues which need to be addressed?
 - Did the scope of the programme change during implementation? If so, what was the impact?
 - Assess the contribution by other parties involved in the delivery of the programme and identify any potential improvements for example, the provision of the Postgraduate Diploma?
- An assessment of the appropriateness of the current resourcing levels and structure of the Managing Agent and InterTradelreland team.
- Engage with programme stakeholders to include a **minimum** of forty beneficiaries, twenty from Northern Ireland and twenty from Ireland, to include businesses, academia and graduates to gauge their experience of delivery and receive feedback in terms of recommendations/ suggestions for improvement.
- It is anticipated, InterTradelreland will seek to test the market on how to deliver upon high level outcomes. Any relevant information relating to such activities will be made available to the contractor.

3. Redevelopment Delivery Model options

- Conclude on the overall findings of the evaluation; taking account of all available evidence from the evaluation. This should include quantified assessments of VFM, the level of additionality/deadweight, market failure, time efficiency and displacement and relevant cost-effectiveness indicators.

- An overall VFM conclusion should be based on: strategic fit; need/market failure; additionality/deadweight; displacement; viability; risk; the 3 'Es' (economy; efficiency; effectiveness); cost effectiveness; and economic efficiency test results (quantifiable economic impacts, and qualitative wider and regional economic benefits).
- Summarise the lessons learned with respect to the implementation of the programme. Document any abnormal events, consider performance methods and tools, and recommend future enhancements and state what went well and what could be improved.
- Provide robust recommendations for future-focused re-developed delivery model options that should include but not be limited to the following components based on the research findings:
 - Levels and Types of Support
 - Nature of Funding that may consider;
 - Mentorship and Advisory
 - Networking and Partnership Opportunities
 - Eligibility and Targeting Criteria
 - Targeted Support – considering current and developing industry sectors
 - Flexible Eligibility: Assess potential of eligibility criteria that are inclusive and adaptable to smaller startups or high-risk sectors.
 - Pathways for Scale-Up Support: Assess inclusion on pathways that allow early-stage companies to continue receiving support as they grow and scale.
- Monitoring and Evaluation Metrics
- Potential categories of businesses by size and sector, offering varying levels of support. Provide concise recommendations as to how to improve future delivery and management of the programme and opportunities for any potential future phases.
- Programme management effectiveness, resourcing & structure
- Uptake
- Eligibility
- Outputs/Outcomes

Outputs

It is expected that the contractor engaged will, as a result of the work carried out on the interim evaluation of Innovation Boost Programme, produce a written report containing the findings and recommendations by the date above.

It is expected that the evaluation will include reference to, and consultation with, all relevant organisations including:

- Invest NI;
- Enterprise Ireland;
- The companies, academia and graduates involved in Innovation Boost Programme
- The InterTradelreland Director of Innovation & Entrepreneurship
- The InterTradelreland programme delivery staff
- The InterTradelreland Innovation Sub-committee;
- The Innovation Boost Programme Managing Agent and sub-contractors, William J Clinton Leadership Institute, Queen's University Belfast;
- Other relevant organisations for example University Career Offices.

Terms of Reference

(b) Economic Appraisal of the InterTradelreland Innovation Boost Phase VII Programme

To build on the successes of the first six phases of Innovation Boost (previously known as FUSION), InterTradelreland has a requirement for consultancy services to carry out an economic appraisal assessing the feasibility of a further phase of Innovation Boost in accordance with Better Business Cases NI guidance.

Specific areas that InterTradelreland would like the appraiser to consider include:

- The overall structure and elements of the next five-year phase, which in part will be informed by (a) interim evaluation and delivery model review of Phase VI.
- Assessment of Innovation Boost's position in relation to other innovation supports available to SMEs.
- Consideration of potential integration with current and future InterTradelreland innovation supports that could create synergies and efficiencies
- Competitiveness of the support packages.
- Assessment process - level of scrutiny of Innovation Boost applications commensurate with amount of support and level of innovation involved.
- Most appropriate means of measuring the qualitative benefits e.g. increased capabilities
- Recommendations for improvement of the current delivery model of standard and of company-to-company projects, including an assessment of costs.
- Considerations should be given for options to minimise the risk of projects not starting or delaying starting following approval.
- Potential for a strand of the programme aimed at micro businesses.
- Conclusions and recommendations of the Interim Evaluation of Innovation Boost Phase VI.

It is expected that the appraisal will include reference to, and consultation with, all relevant organisations including:

- InterTradelreland Executive and Senior Management Team
- A selection of companies involved in Innovation Boost;
- the InterTradelreland Innovation Boost Steering Committee;
- the current Managing Agent;
- Universities, Institute of Technologies & Colleges throughout the Island;
- Graduate participants;
- Invest NI;
- Enterprise Ireland;
- Other relevant organisations.

The tenderer should suggest the level and means, and the indicative content of these consultations.

Appraisal Steps

The appraisal must be conducted in accordance with Better Business Cases NI guidance

(For further information [Better Business Cases NI | Department of Finance](#))

The appraisal must be completed in line with this guidance:

- **Executive Summary**
- **Introduction**

1. **The Strategic Case** - to include providing evidence of how the project is expected to contribute to the objectives of relevant agencies including but not limited to:

- N.I. Draft Programme for Government 2024-2027, Department for the Economy
- Draft Industrial Strategy for Northern Ireland Economy 2030, Department for the Economy
- 10x Economy, Department for the Economy
- Delivering Economic Action Plan 2024/25 – 3 yr forward look
- Skills Strategy for Northern Ireland 2022, Department for the Economy
- Innovation skills - International developments and Northern Ireland economic priorities Report 2024, Department for the Economy
- R&D and Innovation support in Northern Ireland, (2024)
- Enterprise 2030, Department of Enterprise, Trade and Employment
- Impact 2030: Ireland's Research and Innovation Strategy, Department of Further and Higher Education, Research, Innovation and Science
- Establish the market failure, the need for Government intervention, the demand for the programme and conclude on the potential level of additionality and displacement including any potential duplication with similar programmes
- Define the project objectives, establish SMART targets and define the project constraints. In determining the SMART targets, the appraiser should consider the past performance from previous programmes

2. The Economic Case

- Identify and describe a range of options to be taken forward for full appraisal, reflecting variations in scale, content, timing and location of services
- Identify and quantify wherever possible the monetary costs and benefits of each of the options
- Assess risks and adjust for optimism bias (if appropriate)
- Weigh up the non-monetary costs and benefits (including Equality, Sustainability and Lifetime Opportunities), considering the wider and regional benefits that may accrue from the project
- Calculate Net Present Values and assess uncertainties, including an appropriate sensitivity analysis
- Assess the balance of advantage between the options (including VAT where appropriate) and present the appraisal results concluding on the preferred option and the overall Value for Money offered

3. The Commercial Case

- Describe the outputs – i.e. goods/services and works that will be procured. May include managing/delivery agent, technical/financial appraisers, particular specialists. The procurement strategy and route.
- Service requirements and outputs
- Risk allocation
- Charging mechanism
- Key contractual arrangements
- Personnel implications
- Accountancy treatment

4. The Financial Case

- Detail relating to preferred option funding including any assumptions surrounding revenue generation e.g. participant fees, matched funding, should be explained and justified where possible.
- Detail how any funding shortfall will be addressed

5. The Management Case

- To include proposed governance arrangements (e.g. roles, responsibilities and reporting lines and how the governance structure works);
- Project plan for delivery;
- Project assurance (i.e. monitoring performance and delivery; progress reports; provision of advice, guidance, support and information e.g. potential / actual overruns);
- Management of risk;
- Post project evaluation (e.g. who by/when PPE is completed, what will be evaluated and how widely will lessons learned be disseminated. Consideration should be given to providing an interim evaluation.

The contractor should consider compliance with State Aid/UK Subsidy Control Act regulations.

Implementation and Presentation

The execution of the combined,

(a) Interim Evaluation and delivery model review for the InterTradelreland – Innovation Boost Programme

The **delivery of the evaluation and delivery model review** will require a commitment of resources,

- **initiation meeting will be held w/c 10th March 2025,**

- **final written evaluation and delivery model review to be completed by Friday 27th June 2025.** A draft report should be provided **1 week prior to this date, Friday 20th June 2025.**

(b) Economic Appraisal of the InterTradelreland Innovation Boost Phase VII Programme

Will require a commitment of resources to have the work **completed before 3rd September 2025.** A draft report should be provided **1 week prior to this date, Wednesday 27th August 2025.**

All relevant information in respect of both the evaluation and appraisal will be made available to the contractor engaged. This information will be subject to normal restrictions concerning commercial confidentiality and GDPR. The InterTradelreland Project Management team will also be available to the contractor engaged to provide any supplementary information needed during the evaluation and appraisal process.

Overall, the evaluations should be conducted in accordance with the Northern Ireland Guidance on evaluations, including Better Business Cases NI. ([Supplementary evaluation guidance \(finance-ni.gov.uk\)](https://finance-ni.gov.uk)) and the presentation of the appraisal should follow the sequence outlined above (under Appraisal Steps). Any technical or background information necessary to the appraisal and a list of the assumptions made should be included as an annex to the appraisal.

The successful tenderer will be required to attend initial, interim and final review meetings at InterTradelreland's offices for both (a) Interim evaluation and delivery model review and (b) Economic Appraisal of InterTradelreland Innovation Boost Phase 7 and may be required to present their conclusions and any recommendations to the InterTradelreland Board.

We reserve the right to modify the terms, cancel or re-issue the Request for Tender at any time at InterTradelreland's sole discretion.

Clarification questions for this tender must be received by Friday 14th February 2025.

Completed responses to this tender invitation must be received by InterTradelreland by email between 2pm and 2.15pm on Friday 28th February 2025. The response must be submitted to:

tenders@intertradeireland.com

Cost & Payment

All tenders should include a detailed schedule of costs on the attached form "Cost Schedule". It is anticipated that the combined cost of this assignment (a) and (b) will not exceed £130,000 excluding VAT. However, tenderers are advised that this is a competition and should price their bids accordingly.

Payment will be made as follows:

- on satisfactory completion of **draft report** (a) Interim Evaluation and delivery model review for the InterTradelreland – Innovation Boost Programme (25% of the contract price)
- **following approval** by the Innovation & Entrepreneurship Director of InterTradelreland of the final report (a) Interim Evaluation and delivery model review for the InterTradelreland – Innovation Boost Programme (25%)
- on satisfactory completion of **draft report** (b) Economic Appraisal of the InterTradelreland Innovation Boost Phase 7 Programme (25%)
- Approval of final Economic Appraisal report by InterTradelreland and all government Departments (25%)

Evaluation Criteria

InterTradelreland evaluate tenders in 2 stages:

Stage 1 - Selection Criteria – Fair Work Practices / Technical or Professional Ability – Pass/Fail

Fair Work Practices

The Executive and NICS Departments are committed to the delivery of high-quality public services and recognises that this is critically dependent on a workforce that is well rewarded, well-motivated, and has access to appropriate opportunities for training and skills development.

To ensure the highest standards of service quality in this contract we expect contractors to take a similarly positive approach to fair work practices.

This should include:

- clear managerial responsibility to nurture talent and help individuals fulfil their potential, including for example, promoting equality of opportunity and developing a workforce which reflects characteristics such as age, gender, religion or belief, race, sexual orientation and disability;
- support for learning and development;

- stability of employment and hours of work, and avoiding exploitative employment practices, including for example no inappropriate use of zero hours contracts; and
- support progressive workforce engagement, for example Trade Union recognition and representation where possible, otherwise, alternative arrangements to give staff an effective voice.
- a fair and equal pay policy that includes a commitment to supporting the Living Wage, including, for example being a Living Wage Accredited Employer.

Please see [Annex A](#) for further details.

SC1	<p>Fair Work Practices</p> <p>Tenderers must provide evidence of their positive approach to fair work practices. Please describe your policies, which provide fair work practices for workers (including any agency or sub-contractor workers) engaged in the delivery of this contract.</p> <p>Where an Economic Operator(s) is classified and operates as a sole trader the 'Fair Work Strategy' criteria will not apply. Tenderers should clearly evidence this in their response to the criteria.</p>	Pass/Fail
SC2	<p>Proposed Team Experience</p> <p>The Tenderer must clearly identify a minimum of 2 key individuals within the assignment i.e. 1) Project Manager and 2) Senior Consultant. Appendix A and B must be fully completed for these members of the project team as appropriate. The Project Manager and Senior Consultant(s) must demonstrate that they meet the following minimum standards of technical or professional ability as applicable to their role and as identified in this tender document.</p> <ul style="list-style-type: none"> • Project Manager (1 named individual only) must have • Practical experience of working with government-level economic development agencies. • Knowledge of similar economic development programmes. • Knowledge of current and planned economic government policies and strategies. • Experience and knowledge of conducting evaluations AND economic appraisals. • The tenderer must provide two distinct examples demonstrating the Project Manager's experience in leading a project team to complete an evaluation and two separate examples of conducting an economic appraisal of a government-funded business development or innovation programme within the last three years. The examples for evaluation and economic appraisal may be different. • Senior Consultant (may have more than 1 named individual) must have • Practical experience of working with government-level economic development agencies. • Knowledge of similar economic development programmes. • Knowledge of current and planned government policies and strategies in the innovation field. • Experience and knowledge of conducting evaluations and economic appraisals. • The tenderer must provide two distinct examples demonstrating the Senior Consultant's key role in carrying out an evaluation and two separate examples of conducting an economic appraisal of a government-funded business development or innovation programme within the last three years. The examples for evaluation and economic appraisal may be different. 	Pass/Fail

	<p>Responses (per person) contained within <i>Appendix A & B</i> must not exceed 4 A4 pages – Font size Arial 11. Anything in excess of this page limit <u>will not</u> be evaluated.</p> <ul style="list-style-type: none"> • Additional staff members – please name any other staff that will carry out administration duties on the evaluation by completing <i>Appendix C</i>. Please also specify their input in <i>Appendix D – Cost Schedule</i>. <p>Tenderers should note that ‘within the last 3 years’ refers to within 3 years from the closing date of this tender competition. Projects that are currently ongoing and are not yet completed are permitted provided that the Tenderer can demonstrate that the required experience has been achieved, and the start date is included. The evaluation panel will award marks based on the combined experience of all proposed personnel.</p>	
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Pass / Fail: – is defined as;

- Pass – Where the tenderer has fully demonstrated their ability to meet the minimum standard; and
- Fail – Where the tenderer has failed to fully demonstrate their ability to meet the minimum standard.

Stage 2 – Methodology

All tenderers who pass Stage 1 will have their tenders assessed against the qualitative and quantitative criteria (Award Criteria AC1 – AC4) listed within this section. Tenderers must address each criterion fully.

Qualitative Criteria (Quality) – 70% Quantitative Criteria (Price) – 30%

Whilst every endeavour has been made to provide tenderers with an accurate description of the requirements, tenderers should form their own conclusions about the methods and resources needed to meet those requirements, InterTradelreland cannot accept responsibility for tenderers’ assessment of the requirement.

Qualitative Criteria (Methodology)	Weight	Maximum Score
<p>[AC1], Proposed Methodology (a. Interim Evaluation and Delivery Model review)</p> <p>Tenderers must detail their proposed methodology for delivering the key stages of the evaluation and detail how they will allocate resources to ensure delivery within the required timescale.</p> <p>Responses for this Award Criterion must not exceed 4 A4 pages– Font size Arial 11. Anything in excess of this page limit <u>will not</u> be evaluated.</p>	15%	75
<p>[AC2], Key Stage – Effectiveness and Outcomes</p> <p>Approach to evaluate the current programme uptake; level of demand; appropriateness of eligibility criteria, programme fit within the suite of I&E supports; assessment of project timeline and geographic spread of applicants. Approach to quantify and assess any benefits of the programme, including value for money.</p> <p>Responses for this Award Criterion must not exceed 2 A4 pages– Font size Arial 11. Anything in excess of this page limit <u>will not</u> be evaluated.</p>	5%	25
<p>[AC3], Key Stage – Delivery Model</p> <p>Approach to evaluate the effectiveness of the Managing Agent in managing and delivering the current programme; assessment of the appropriateness of the current resourcing levels and structure.</p> <p>Responses for this Award Criterion must not exceed 2 A4 pages– Font size Arial 11. Anything in excess of this page limit <u>will not</u> be evaluated.</p>	5%	25
<p>[AC4], Key Stage – Re-development delivery model options</p> <p>Approach to reporting overall findings of the evaluation; approach to provide robust recommendations for the future-focused re-development delivery model options.</p> <p>Responses for this Award Criterion must not exceed 2 A4 pages– Font size Arial 11. Anything in excess of this page limit <u>will not</u> be evaluated.</p>	10%	50

<p>[AC-5], Proposed detail for carrying out Economic Appraisal in accordance with Better Business Cases NI</p> <p>Responses for this Award Criterion must not exceed 2 A4 pages– Font size Arial 11. Anything in excess of this page limit <u>will not</u> be evaluated.</p>	10%	50
<p>[AC-6], Consultation Plans</p> <p>Responses for this Award Criterion must not exceed 2 A4 pages– Font size Arial 11. Anything in excess of this page limit <u>will not</u> be evaluated.</p>	5%	25
<p>[AC-7], Approach to consideration of “Specific Requirements of the Economic Appraisal” as detailed on page 8/9.</p> <p>Responses for this Award Criterion must not exceed 2 A4 pages– Font size Arial 11. Anything in excess of this page limit <u>will not</u> be evaluated.</p>	5%	25
<p>[AC-8], Project Plan</p> <p>The plan must include key dates, goals and milestones to ensure delivery of this service. This should clearly demonstrate the plan for both, (a) Interim Evaluation and Delivery Model review AND (b) Economic appraisal InterTradelreland Innovation Boost Phase 7</p> <p>Responses for this Award Criterion must not exceed 4 A4 pages– Font size Arial 11. Anything in excess of this page limit <u>will not</u> be evaluated.</p>	5%	25
<p>[AC-9], Contract Management</p> <p>Tenderers must demonstrate how they propose to manage the Contract to ensure the provision of a high-quality service, which meets the requirements set out within the Specification. The response must detail what systems and processes will be in place to ensure the continuity of service in the event of unplanned events (e.g. staff absences, systems failure etc.) and the procedures for escalation in the event that problems cannot be resolved at the operational level.</p> <p>Responses for this Award Criterion must not exceed 3 A4 pages– Font size Arial 11. Anything in excess of this page limit <u>will not</u> be evaluated.</p>	10%	50
Quality Total	70%	350

Quantitative Criteria (Price)	Weight	Maximum Score
[AC-10], Price	30%	150
Total	Weight	Maximum Score
Quality + Price	100%	500

Key to Scoring

To ensure consistency and equality the evaluation panel will assign scores for quality of response to the qualitative requirements using the scores and indicators below:

Score	Descriptor
0	Failed to address the criterion.
1	Poor proposal to address the criterion.
2	Limited proposal to address criterion.
3	Acceptable proposal to address the criterion.
4	Good proposal to address the criterion.
5	Excellent proposal to address the criterion.

If tenderers score 2, 1 or 0 in any of the qualitative criteria [AC-1] – [AC-9], then it shall be deemed that they have failed to meet the specification and their tender will be eliminated from the competition.

Quantity Assessment (Price)

For those tenders passing the qualitative assessment, the following formula will be used to evaluate price.

1. Lowest price tendered will be awarded the maximum score available [150]
2. To calculate the score for the remaining prices, the following formula will be applied. The lowest tendered price divided by the tenderers price multiplied by 150
3. Where a zero cost or “no cost” offer is made, this offer will be assigned a nominal 1 pence value for assessment purposes only.

Tenderers should note that InterTradelreland is not obliged to accept the lowest or any tender.

Tenderers must respond to each criterion by providing a detailed methodology. In particular, each section must contain a method statement detailing their proposed approach to delivering on the contract requirements.

Organisations that have been engaged or involved in the delivery of services to the Innovation Boost Programme are precluded from tendering for this contract.

Contact Details

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Annex A**WHAT GOOD FAIR WORK PRACTICE LOOKS LIKE**Good Practice examples equality of opportunity and diversity

- Clear managerial responsibility to nurture talent and help individuals fulfil their potential, including for example, promoting equality of opportunity and developing a workforce which reflects characteristics such as age, gender, religion or belief, race, sexual orientation and disability
- Fair Work expects employers to go beyond their legal obligations under the [Equality Act 2010](#), enhancing the protections for workers on the basis of their age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion and belief, sex, and, sexual orientation.
- Employment can play a major part in addressing racial inequality. Through fair working practice, minority ethnic workers will be able to access and sustain employment commensurate with their skills, experience and/or employment goals and in working environments that are diverse and inclusive.
- Disabled people also experience discrimination and a lack of access to opportunity. We need to ensure our workplaces are not designed or operating in ways that can create barriers and exclude disabled people. Fair and equal access, and the provision of appropriate support, can greatly improve disabled people's chances, enabling access to jobs, job retention and career progression.

Good practice examples recruitment

- Recruitment, retention and promotion processes prevent bias and barriers, e.g. 'blind' recruitment; providing any additional support/adjustments at interviews; diversity in interview panels; exit interviews are used to understand why a person is leaving.
- Workers have opportunities to influence the organisation's approach to workplace equality, including by sharing their own experiences.
- The organisation gathers data to understand its workforce diversity and has a plan in place to address under-representation.
- Governance structures are gender balanced and the organisation is working to ensure parity for minority ethnic, disabled and younger people.
- Workplace adjustments are made for disabled staff who need it, e.g. Access to Work.
- Everyone has equal access to appropriate learning & development opportunities.
- All staff have opportunities to discuss their support needs with management.
- Employers are able to provide safe spaces for workers to express their concerns and raise issues and where workers are confident that their concerns are dealt with appropriately by trained personnel.

Good examples support for learning and development

- Effective workforce development involves employers providing opportunities for their staff at all levels of the organisation and should be a shared responsibility and shared commitment between the employer and workers.
 - Everyone should be able to engage in lifelong learning.
1. Learning & development is integrated in the organisation's strategic planning and workers and management jointly identify development needs and priorities, ensuring both individual and organisational needs are met.
 2. Regular equality and diversity training is provided for all staff.
 3. Learning & development opportunities are provided, and regularly reviewed, to help build the organisation's resilience and responsiveness to change.
 4. Formal and informal learning is offered across the workforce, relating to people's particular role and wider development.
 5. The organisation is committed to providing apprenticeships.

Good examples secure employment and avoiding exploitative employment practices, including for example no inappropriate use of zero hours contracts

- Although there is no legal definition of a zero-hours contract, in the context of Fair Work, such a contract is one which does not guarantee any work to the individual and does not set out a minimum number of hours (whether ongoing or for a set period). An employer is likely to be using a zero-hours contract inappropriately if:
 - they offer a worker a regular pattern of work or regular number of hours but offer only a casual/zero-hours contract;
 - a worker has had no say in the zero-hours contract and actually wants a contract of employment guaranteeing a minimum number of hours;
 - they put pressure on a worker to accept the terms of a zero-hours contract (where challenged) in order to keep their job;
 - there is an expectation that workers will accept all hours offered but no reciprocal expectation that the employer will guarantee hours of work.
- Employers using zero-hours contracts should be able to credibly explain their exceptional circumstance which leads to them using such contracts and the steps they are taking to review their business model to eliminate these circumstances.
- All staff are employed on open-ended or fixed term contracts with confirmed hours and work pattern.
- All staff have a contract which accurately reflects the hours worked, guarantees a fair minimum number of hours per week and does not involve compulsory overtime.
- Staff get reasonable notice of shifts – at least 4 weeks ahead of time and are paid for cancelled shifts within this period.
- Core and flexible staff resources are reviewed at least annually to determine if any staff on a zero-hours or minimum-hours contract can be moved to a permanent or fixed-term contract with a fixed number of hours and/or a regular pattern.
- Zero-hours contracts are not used to the detriment of workers with protected characteristics and where this is happening, the organisation is taking remedial action.
- Zero-hours contracts are not used to fill actual longer-term vacancies.

There is a clear, published policy and process to enable someone to request a move from a zero-hour contract with guaranteed and set hours. Good examples workforce voice and recognition

- Effective voice is much more than having a communication channel available within an organisation. It requires a safe environment where dialogue and challenge are central to the organisational culture, are dealt with constructively, and where employee views are sought out, listened to and acted upon, and can make a difference.
- Effective voice requires workers, employers and trade unions or worker representative groups to work in partnership to make sure the right decisions are made to ensure workers are treated fairly and equitably. The co-determination of working practices is key to delivering all of the dimensions of Fair Work effectively.
- Involving trade union/employee representatives in key governance and decision-making structures.
- Recognising trade unions for the purpose of collective bargaining and encouraging membership, where this is the workforce's preferred route, and providing appropriate facility time for supporting regular engagement between union/s and members.
- Constructive dialogue between the employer, workers and where appropriate a relevant trade union/s to address workplace issues or disputes, e.g. absence management, grievance, health & safety.
- Regular surveys are carried out to understand worker views, including how well they feel effective voice is facilitated in the organisation, and are involved in agreeing and progressing improvement action.
- Appropriate collective consultation and a clear route for resolving issues at both individual and collective levels, such as through a grievance or collective disputes procedure.
- Dealing with issues/concerns which have been formally raised fairly in a timely and constructive manner and which promotes confidence that, whatever the outcome, fair processes have supported fair resolution.

Appropriate measures are in place to support dignity in the workplace and implement zero tolerance of workplace bullying and other forms of abuse and harassment.

NAME:
POSITION WITHIN ORGANISATION:
SPECIFIC EXPERIENCE – Please provide detail to address:
i. The Project Manager must have practical experience of working with government-level economic development agencies.
ii. Knowledge of similar economic development programmes:
iii. Knowledge of current and planned government policies and strategies in the innovation field:
iv. Experience and knowledge in conducting evaluations and economic appraisals.
<p>The tenderer must provide two distinct examples demonstrating the Project Manager's experience in leading a project team to complete an evaluation and two separate examples of conducting an economic appraisal of a government-funded business development or innovation programme within the last three years. The examples for evaluation and economic appraisal may be different.</p> <p>NB: Three years is defined as 3 years from the closing date stated on this tender document.</p> <p style="text-align: center;"><u>Example 1 - Evaluation</u></p> <p>Client: Assignment: Date Completed: Description of Assignment and its relevance:</p>
<p style="text-align: center;"><u>Example 2 - Evaluation</u></p> <p>Client: Assignment: Date Completed: Description of Assignment and its relevance:</p>
<p style="text-align: center;"><u>Example 1 - Economic Appraisal</u></p> <p>Client: Assignment: Date Completed: Description of Assignment and its relevance:</p>
<p style="text-align: center;"><u>Example 2 - Economic Appraisal</u></p> <p><u>Client:</u> <u>Assignment:</u> <u>Date Completed:</u> <u>Description of Assignment and its relevance:</u></p>

Responses (per person) contained within this Appendix must not exceed 4 A4 pages– Font size Arial 11. Anything in excess of this page limit will not be evaluated.

APPENDIX B – ROLE WITHIN THIS ASSIGNMENT: SENIOR CONSULTANT

NAME:
POSITION WITHIN ORGANISATION:
SPECIFIC EXPERIENCE
i. The Senior Consultant must have practical experience of working with government-level economic development agencies:
ii. Knowledge of similar economic development programmes:
iii. Knowledge of current and planned government policies and strategies in the innovation field
iv. Experience and knowledge of conducting evaluations and economic appraisals
The tenderer must provide two distinct examples demonstrating the Senior Consultant's key role in carrying out an evaluation and two separate examples of conducting an economic appraisal of a government-funded business development or innovation programme within the last three years. The examples for evaluation and economic appraisal may be different.
NB: Three years is defined as 3 years from the closing date stated on this tender document.
<u>Example 1</u> - Evaluation
Client: Assignment: Date Completed: Description of Assignment and its relevance:
<u>Example 2</u> - Evaluation
Client: Assignment: Date Completed: Description of Assignment and its relevance:
<u>Example 1</u> - Economic Appraisal
Client: Assignment: Date Completed: Description of Assignment and its relevance:
<u>Example 2</u> - Economic Appraisal
Client: Assignment: Date Completed: Description of Assignment and its relevance:

Responses (per person) contained within this Appendix must not exceed 4 A4 pages– Font size Arial 11. Anything in excess of this page limit will not be evaluated.

APPENDIX C – ADDITIONAL STAFF MEMBERS**NAME:****POSITION WITHIN ORGANISATION:****ROLE WITHIN THIS ASSIGNMENT INCLUDING DUTIES:**

Responses (per person) contained within this Appendix must not exceed 2 A4 pages– Font size Arial 11.

APPENDIX D – COST SCHEDULE

The proposed cost of the assignment **should be stated in £ Sterling and should be exclusive of VAT.**

BREAKDOWN OF COSTS AND DAYS

Programme Activity	Resource Name	Number of Days	Cost £ STG
	Totals		

DAILY RATES

Individual	Daily Rate £

ESTIMATE OF EXPENSES

Please provide an estimate of expenses, which you anticipate will be incurred during the course of the assignment.

Expense Description	Estimated Amount £
Total	

TOTAL ASSIGNMENT COST (Including Expenses) excluding VAT

	£
Total cost (for time input)	
Total cost (Expenses)	
TOTAL ASSIGNMENT COST	

Appendix E – VAT
VAT REGISTRATION

Part 1 or Part 2 to be completed as appropriate by the Tenderer and returned at the time of tendering.

1. My/Our VAT Registration Number is	
Signed by	
For and on behalf of	
Date:	
2. I/We are "EXEMPT" from VAT under the terms of the Finance Act 1972	
Signed	
For and on behalf of	
Date	

Appendix F**DECLARATION AND UNDERTAKING TO BE SIGNED BY ALL MAIN CONTRACTORS, NOMINATED SUB-CONTRACTORS OR CONSULTANTS TENDERING FOR THE EXECUTION OF WORKS OR THE SUPPLY OF GOODS OR SERVICES AND MUST BE RETURNED AT THE TIME OF TENDERING****FAIR EMPLOYMENT AND TREATMENT (NORTHERN IRELAND) ORDER 1998**

1. Article 64 of the Fair Employment and Treatment (Northern Ireland) Order 1998 provides inter alia that a public authority shall not accept an offer to execute any work or supply any goods or services where the offer is made by an unqualified person in response to an invitation by the public authority to submit offers. Article 64(4) also provides that the public authority shall take all such steps as are reasonable to secure that no work is executed or goods or services supplied for the purposes of such contracts as are mentioned above by an unqualified person.
2. For the purposes of Articles 64 – 66 of the Order, an unqualified person is a person on whom a notice has been served under Article 62(2) or Article 63(1) of the Order and which has not been cancelled.
3. Mindful of its obligations under the Order, InterTradelreland has decided that it shall be a condition of tendering that a contractor shall not be an unqualified person for the purpose of Articles 64 – 66 of the Order.
4. Contractors are therefore asked to complete and return the form endorsed hereon, with their tender, to confirm that they are not unqualified persons and to undertake that no work shall be executed or goods or services supplied by an unqualified person for the purposes of any contract with Inter *Tradelreland* to which Article 64 of the Order applies

FAIR EMPLOYMENT AND TREATMENT (NORTHERN IRELAND) ORDER 1998

I/We hereby declare that I am/we are not unqualified for the purposes of the Fair Employment and Treatment (Northern Ireland) Order 1998.

I/We undertake that no work shall be executed or goods or services supplied by any unqualified person for the purposes of any contract with InterTradelreland to which Article 64 of the Order applies.

Signed by:	
Duly authorised to sign for and on behalf of:	
Date:	

Appendix G

InterTradelreland

CERTIFICATE RELATING TO BONA FIDE TENDER

1. The essence of tendering is that the client shall receive bona fide competitive tenders from all firms tendering. In recognition of this principle, we certify that this is a bona fide tender intended to be competitive and that we have not fixed or adjusted the amount of the tender by or under or in accordance with any agreement or arrangements with any other person.
2. We also certify that we have not:
 - a. Communicated to a person other than the person calling for these tenders the amount or approximate amount of the proposed tender, except where the disclosure, in confidence, of the approximate amount of the tender was necessary to obtain insurance premium quotations required for the preparation of this tender;
 - b. Entered into any agreement or arrangement with any other person that he shall refrain from tendering or as to the amount of any tender to be submitted;
 - c. Offered or paid or given or agreed to pay or give any sum of money or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other tender or proposed tender for the said work any act or thing of the sort described above
3. We undertake that we will not do any of the acts mentioned in paragraphs 2a, 2b or 2c above at any time before the acceptance or rejection of this tender.
4. In this certificate the word "person" includes any persons and anybody or association corporate or unincorporate any "any agreement or arrangement" includes any such transaction, formal or informal and whether legally binding or not.

Signed by:	
Duly authorised to sign for and on behalf of:	
Date:	

Appendix H

**FORM OF TENDER
TO BE COMPLETED BY THE TENDERER AND RETURNED AT THE TIME OF TENDERING**

1. I/We the undersigned hereby tender for the contract at the prices quoted in Appendix D forming part of my/our tender response.
2. I/We declare there would be no conflict of interest or perceived conflict of interest in relation to the personnel or type of work involved in this contract.
3. I/We agree that this Tender together with your written acceptance thereof shall constitute a binding contract between us in relation to the whole or such part of the Tender as may be specified in your written acceptance.
4. I/We accept and agree to abide by the Terms of Reference which take precedence over any terms, conditions, stipulations or provisos which may appear on or be annexed to any correspondence submitted by me/us in connection with this Contract.
5. I/We understand that ITI does not bind itself to accept the lowest or any tender submitted in response to this enquiry and may accept the whole or part of any tender.
6. I/We understand that the acceptance of any Tenders will be on the basis of the published evaluation criteria.
7. I/We understand that the acceptance of this Tender does not bind ITI to place any orders under it and that the ITI may accept more than one Tender for the supply of the service covered by this Tender.
8. I/We understand the ITI reserves the right to discontinue the award procedure in the event of irregular tenders or in the absence of appropriate tenders and in such circumstances may use the negotiated procedure without a further call for competition.
9. I/We warrant that I/we have all the requisite corporate authority to sign this tender.

Dated this	Day of	
Signed by or on behalf of the Tenderer:		
Name of Tenderer:		
Registered Address:		