**ANNEX B-TERMS OF REFERENCE FOR INSTITUTIONAL CONTRACT FOR PROVISION OF SERVICES**

**Risk analysis and foresight consultancy in support of:**

**Prospects for children: a global outlook for 2022**

1. **Background:**

UNICEF is acutely aware that changing social, political, economic and environmental dynamics present both significant challenges as well as opportunities for ensuring the rights and wellbeing of children are fulfilled. The pace and impact of these changes are in turn driven by a wide range of factors and trends – many of which are reviewed by organisations producing regular thematic or global analysis such as the IMF’s World Economic Outlook or the World Economic Forum’s Global Risks Report. What is lacking from these reports, however, is a child-focused interpretation of the data and emerging trends. As an organisation focused on child rights, that operates in more than 180 countries across the world, UNICEF has sought to explore ways of better understanding these global trends including drivers of risk as well as emerging opportunities. Currently, UNICEF monitors risks and opportunities at a country level through thematic or geographic situational analyses. UNICEF has also conducted reviews of global trends in preparation of organisation-wide strategic plans and mid-term reviews. The most recent such review, ‘*Prospects for children: a global outlook for 2025’*, was completed by the Office of Global Insight and Policy in December 2020. It provided a medium-term analysis of the prospects for the world’s children leading up to the planned fulfilment of the Sustainable Development Goals in 2030. The report examined the nature and consequences of an exit from the COVID pandemic; considered the trajectory of longer-term trends that were posited as being critical in shaping the world and children’s lives; and identified possible events and trends that are less significant today, but which have the potential to define the medium-term prospects for children. A copy of the Outlook 2025 review is attached as Annex 1.

The Office of Global Insight and Policy (known hereafter simply as the Global Insights Team), which serves as UNICEF’s internal thinktank, plans to produce an annual ‘*Global Outlook for Children*’, a flagship product, which will provide an analysis of emerging social, political, economic, environmental, and technological trends in order to identify critical inflection points for children (up to age 18) and young people (up to age 25) in the year to come, and will additionally support regional offices seeking to produce such reviews for their region. To successfully produce such an annual review, UNICEF is seeking professional services from an organisation with a focus on risk analysis and foresight.

1. **Purpose and objective of the consultancy:**

The purpose of this consultancy is to enhance the understanding of the emerging exogenous factors shaping children’s lives and raise the profile of child rights and issues of importance for child wellbeing in the global discourse on emerging trends and risks. The objective of this consultancy is to: i) identify the global trends or dynamics that are particularly key to look out for in the next 12 months; and ii) analyse how these trends (or potential one-off events) will impact children and young people.

The Risk Analysis and Foresight Organization (referred to as the Analytic Organisation hereafter) will be an impartial, expert organization selected by the Global Insights Team to support the production of the *Global Outlook for Children for 2022* by providing specific analytic inputs which will form the deliverables of this consultancy.

1. **Work Assignments**

The consultancy will be carried out in the following three steps:

**Phase 1: Analysis of Five-Year Trends**: The Analytic Organisation will review UNICEF’s Outlook 2025 (attached as Annex 1 of the TOR) and identify the most important factors shaping the outlook for children in 2022. The purpose of this analysis is to benchmark UNICEF’s assumptions and reflections against the Analytic Organisation’s own trend analysis/risk assessments and datasets and identify factors most critical to children and young people in 2022. The Analytic Organisation may seek to conduct key informant interviews with external experts if required or may utilize internal resources only. The analysis will be a written, data-driven narrative presented as a PowerPoint (or other relevant format) presentation including detailed notes and references where appropriate. The Analytic Organisation will accommodate one round of reasonable requests by UNICEF for modifications of the slides and notes based on the presentation and resultant discussion.

**Phase 2: Identification of possible black swans, tipping points and weak signals pertinent to children in 2022:** The Analytic Organization will draw on its analytic capacities and assessment of internal and external datasets to identify possible events and trends that have the potential to have an impact on children and young people and define the next year. The presentation and notes on these swans, signals and tipping points will include information on the background, drivers, impact and relevance of the trend(s) on children and young people. The Analytic Organisation will accommodate one round of reasonable requests by UNICEF for modifications of the slides and notes based on the presentation and resultant discussion.

**Phase 3: Scenario Planning:** Based on the analysis in Phases 1 and 2 and UNICEF’s own internal review process, the Global Insights Team will suggest up to five areas for the Analytic Organisation to postulate potential scenarios of what the outlook for children will be by the end of 2022 in relation to specific predictions (for instance if global vaccination rates remain below 50% by 2022, then we can expect…… or if US-Chinese relations deteriorate further, then we can expect….). Each scenario will be a written, data-driven narrative compiled using the trend analyses from Phases 1 and 2 which will be presented as a PowerPoint (or other relevant format) presentation and include detailed notes and references as appropriate. The Analytic Organisation will accommodate one round of reasonable requests by UNICEF for modifications of the slides and notes based on the presentation and resultant discussion.

1. **Deliverables:**

The following are the set of deliverables to be submitted under this contract:

* Deliverable 1: **Key Factors likely to affect children and young people in 2022** based on UNICEF’s Outlook 2025 and Analytic Organisation’s own trend analysis (slide deck of no more than 20 slides, presentation and discussion with the Global Insight Team);
* Deliverable 2: **Identification of Swans and Signals** which may be relevant to children in 2022 (slide deck and notes of no more than 10 slides, presentation and discussion with the Global Insight Team)
* Deliverable 3: **Up to 5 Scenarios** outlining the potential impact on children of specific predictions (slide deck and notes of no more than 20 slides, presentation and discussion with the Global Insight Team)

1. **Reporting Requirements**

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| Task | Proposed date | Responsibility |
| Inception meeting on consultancy (2 hours – Zoom or Teams with a note for the record of the meeting) | Oct 8 (TBC) | Joint  Analytic Organ. will produce note for the record |
| Key factors presentation and discussion (PowerPoint or other slide presentation format of no more than 20 slides with accompanying notes and references in Word Format, presentation and discussion of 2 hours via Zoom or Teams) | Oct 19 (TBC) | Analytic Organ. for slide deck and notes of the discussion  Joint for discussion |
| Slide deck updated based on outcomes of discussion which will be recorded (20 slides and notes) | Oct 25 (TBC) | Analytic Organ. |
| Slide deck on Swans and Signals presentation and discussion (PowerPoint or other slide presentation format of no more than 10 slides with accompanying notes and references in Word Format presentation and discussion of 1 hour via Zoom or Teams,) | Nov 04 (TBC) | Analytic Organ. for slide deck and notes on discussion  Joint for discussion |
| Slide deck updated based on outcomes of discussion  (10 slides and notes) | Nov 8 (TBC) | Analytic Organ. |
| Ideas scenario planning provided | Nov 11 (TBC) | Insight Team |
| Scenario planning slide deck presentation and discussion (PowerPoint or other slide presentation format of no more than 20 slides with accompanying notes and references in Word Format; presentation and discussion of 2 hours via Zoom or Teams,) | Nov 22 (TBC) | Analytic Organ. for slide deck and notes on discussion  Joint for discussion |
| Slide deck updated based on outcomes of discussion  (20 slides and notes) | Nov 24 (TBC) | Analytic Organ |

1. **Location and Duration**

The consultancy will take place over a two-month period (October and November) and will be conducted remotely with meetings and discussions held via Zoom or Microsoft Teams. No travel is required by the Analytic Organisation.

1. **Qualifications or Specialized Knowledge/Experience Required**

The Analytic Organization is expected to have:

* Minimum 7-10 (seven to ten) years’ experience analyzing emerging social, political, economic, environmental, and technological trends and risks at a regional and global level.
* Demonstrated expertise and understanding of child rights and well-being
* Diverse group of analysts, researchers and experts to draw on for this consultancy
* Familiarity of working with the UN system will be an advantage.

The Analytic Organization should propose the necessary number of days to complete the assignment and provide an indication of both the approach to be followed and the experts/analysts who will be involved.

The Technical Proposal should therefore include, but not be limited to, the following:

1. Corporate profile highlighting the bidder’s qualifications and experience in implementing the assignment. Please include details of specific experiences with similar assignments in the past five years.
2. Details of the Proposed Team for the assignment including the following information:
   1. Title/designation of each team member to be involved
   2. Educational qualifications (Masters or PhD) and professional experiences (minimum of 10 years relevant work experience for Team Leader, and 5-7 for all other team members)
   3. Experience in working on similar projects and their specific roles on those projects/reviews (experience working on global, not just national or regional, trends analysis is important as is demonstrated expertise on child and adolescent well-being and rights)
3. Details of (in-house or external) datasets to be utilized for this assignment
4. Details of any external subject matter experts to be consulted or involved in this assignment including their qualifications and experience.
5. Demonstration of detailed understanding of UNICEF’s requirements for the consultancy and the bidder’s value proposition.
6. Detailed description of a proposed methodology for the analysis and approach which demonstrates how the bidder meets or exceeds UNICEF requirements for this assignment, including –
   1. High level work plan with proposed timelines and milestones for each deliverable, taking into account the above-described scope of work and showing the detailed sequence and timeline for each activity and days necessary for each proposed team member.
7. **Evaluation process and methods**

Proposals will be reviewed following a two-step process:

i. Technical evaluation (70 points)

ii. Evaluation of financial proposal (30 points)

A maximum of 70 points will be allocated to the technical aspects of the bids, with a further 30 points for the price component, for a maximum possible score of 100 points.

1. Technical evaluation (70 points)

The technical evaluation will consist of two phases:

Phase 1 – desk review (maximum 50 points): the proposals will be evaluated on the criteria outlined below. Only those proposals that score 40 points and above will be considered technically compliant and will proceed to Phase 2. All other proposals will be disqualified

Phase 2 – interviews (maximum 20 points): qualifying proposers will be invited to brief interview to present their proposals and answer questions for further assessment of suitability. A minimum of 15 points will be required for proposers to qualify for the financial evaluation. All other proposals will be disqualified for further evaluation.

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| **Phase 1 – Desk Review** |  |
| 1. **Company profile and personnel** | Points |
| 1.1 Range and depth of company experience with similar projects/trend analysis | 10 |
| 1.2 Qualifications, competencies, and specialized knowledge areas of proposed personnel | 15 |
| 1. **Proposed methodology for analysis** |  |
| 2.1 Demonstrated understanding of task | 5 |
| 2.2 Methodology, project management, and timelines | 10 |
| 2.3 Proposed use of data sets | 5 |
| 2.4 Qualifications, competencies and specialized knowledge of proposed use of (external) subject matter experts | 5 |
| **Total Scores for phase 1** | **50** |
| Minimum scores for phase 1 | 40 |
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| **Phase 2 - Interview** |  |
| 1. **Presentation and interview** |  |
| 3.1Presentation of proposal (10 minutes maximum) | 10 |
| 3.2 Follow up technical questions and clarifications (20 minutes) | 10 |
| **Total Scores for Phase 2** | **20** |
| **Minimum scores for phase 2** | **15** |
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| **Total maximum combined scores from phase 1 and phase 2** | **70** |
| **Total minimum technical scores (phase 1 + phase 2)** | **55** |

1. Financial Evaluation (30 points)

A proposal offering the lowest total costs for the analytic inputs shall be awarded 30 points, all other price proposals receive scores in inverse proportion according to the following formula:

*Score for price proposal X = (Maximum score for price proposal (e.g. 30) \* Price of lowest priced proposal) / Price of proposal X*

Bidders should ensure that all pricing information is provided in accordance with the Financial Plan template of the RFP shown below -

Proposal obtaining the overall highest combined/cumulative score as a result of technical and financial evaluations, will be considered as the most responsive proposal, i.e. representing best value, and will be recommended for award.

1. **Administrative Issues**

The Analytic Organisation will be responsible for outlining and agreeing the timeline with UNICEF during the inception meetings. The Analytic Organisation will also be responsible for scheduling of Zoom (or Teams) Meetings with UNICEF staff and any key informant interviews that may be required. No travel or in-person meetings are required for this assignment. All deliverables will be provided in the format of PowerPoint slides (with accompanying notes) or other presentation format agreed with UNICEF during the inception meeting.

1. **Project Management/Contract Supervisor and other stakeholders**

The Office of Global Insight and Policy will manage this contract. The focal person will be the Chief of Policy, Jasmina Byrne. Manasi Nanavati, Policy Officer in the Policy Section will be the point person for administrative questions in relation to the contract.

1. **Payment Schedule**

Payments will be made based on invoices for each deliverable as follows: 30% for Deliverable 1: Key Factors likely to affect children and young people in 2022; 35% for Deliverable 2: Identification of Swans and Signals; and 35% for Deliverable 3: Up to five Scenarios outlining the potential impact on children of specific predictions.

Fees shall be calculated based on the days offered to complete the assignment and shall be considered the maximum compensation as part of a lump sum contract. No additional fees shall be paid to complete the assignment. Payment will be made upon submission and approval of deliverables and full and satisfactory completion of the assignment. No advance payments are possible.

Jasmina Byrne, Chief of Policy Section, Office of Global Insights and Policy will be responsible for approving payments based on the completion of deliverables.

**Annexes**

TOR Annex 1: A copy of the Outlook 2025 review is attached