

Annex A: Terms of Reference

RFQ/22/022/RBAP/PSP

**Request for quotation for market research on the Islamic philanthropy potential in
Uzbekistan and Kazakhstan**

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2. Introduction

2.1 Background

The United Nations High Commissioner for Refugees Representation (UNHCR) was established on December 14, 1950 by the United Nations General Assembly. The UN Refugee Agency is mandated to lead and co-ordinate international action to protect refugees and resolve refugee problems worldwide.

UNHCR is almost entirely funded by voluntary contributions from governments and private donors. In 2022, UNHCR needs USD 8.9 billion for its global work. This amount is set to grow with current conflicts fueling displacement.

UNHCR has one of the fastest growing international private sector fundraising programmes in the world with ambitious targets. UNHCR currently has private sector fundraising operations in 29 countries in Asia/Pacific, Americas, Africa, Europe and MENA.

Please find more via our website: <https://www.unhcr.org/>

The Private Sector Partnerships (PSP) unit of UNHCR in the MENA region consists of almost 60 people that are responsible for raising awareness and funds from the private sector in the Middle East and North Africa. PSP works with various entities in the region including refugees and internally displaced populations, media networks, high net-worth individuals (HNWIs), corporations, private foundations and various suppliers and vendors in order to raise awareness from the public, and capture their attention with engaging content and messaging and in turn have these individuals advocate for refugees and other people of concern. The goal is to secure funding so that UNHCR can cater to the needs of its beneficiaries, giving them a fighting chance and hope for the future through education, health, protection and cash assistance programs, among many others.

In 2014, UNHCR started to look in the possibility of raising Islamic philanthropy funds and in 2019, UNHCR launched the 'Refugee Zakat Fund': a trusted, compliant and effective distributor maximizing the power of Zakat and Sadaqah to transform the lives of refugees. The Fund is subject to rigorous governance, ensuring transparency at every step, from donation to distribution of Zakat funds to eligible families among the refugees and internally displaced persons.

2.2 Statement of Purpose & Objectives

In a strategy to roll out its Islamic philanthropy activities globally to new markets, UNHCR is looking for conducting:

LOT 1: research on the fundraising potential in Uzbekistan

LOT 2: research on the fundraising potential in Kazakhstan

This research aims at building a base of information and knowledge of the Uzbekistan and Kazakhstan markets, philanthropy trends within both countries, with a focus on Islamic philanthropy, and recommend a strategy for UNHCR to successfully enter this market.

Companies can submit a proposal separately for Uzbekistan and Kazakhstan. It is not a mandatory to send an offer for both countries. The evaluation of the different lots will be carried out separately on

technical and financial level. Please clearly indicate the lot(s) you are bidding for to ease the evaluation process. In case you apply for both countries, one technical proposal will be sufficient. Please make sure all the requirements per lots are included into your proposal.

This document will guide UNHCR's positioning and plans for Islamic philanthropy fundraising activities in Uzbekistan and Kazakhstan. With this market research in place, UNHCR should be in a stronger position to diversify its sources of funding from Central Asia and identify emerging opportunities for funding UNHCR programmes for both refugees and IDPs.

This research will cover the Uzbekistan and Kazakhstan markets, as they have been identified as primary target markets in Central Asia. The research will include 2 main sectors:

- Private: HNWI, corporations, foundations/ NGOs, and religious personalities/ entities (for advocacy and endorsement purposes), without neglecting prospects for individual giving.
- Public: government/ state agencies/ ministries essential to engage with for advocacy and fundraising purposes.

Reference period

The service provision starts as soon as the provider has been appointed and services must be delivered within four months.

Joint venture, sub-contracting

Please be informed that joint venture, or contractor/subcontractor relationship are allowed. In either case, bidder needs to confirm which company is the project led to take responsibility of the commercial relationship. The bid is to be submitted under one company, as leader. The winner bidder will be the contracted party, responsible for performance. UNHCR will deal with only one party (as single legal entity) for the administration of the contract, in case of selection. Please read carefully UNHCR General Terms and Conditions (Annex D, page 3, clause 5) about subcontracting.

3. Requirements

UNHCR is looking for a market analysis that will include the following:

3.1 Elements

The analysis of the targeted market will answer the following questions:

- What is the size of the philanthropy market in Uzbekistan and Kazakhstan?
- What do we need to know about the Muslim community in Uzbekistan and Kazakhstan?
 - Population size
 - Demographics
 - Religious groups/ affiliation
 - Islamic organizations
 - Key Muslim-owned businesses
 - Key personalities (religious, political, business, influencers, sports...)
 - Relationship with the Government (what role Muslims play in Uzbekistan and Kazakhstan politics, do they have an official representative body?)
 - Spending trends of the community

- Who from the above stakeholders are involved with IP? In particular Zakat collection and distribution?
- SWOT Analysis for the advancement of UNHCR's Refugee Zakat Fund in Uzbekistan and Kazakhstan.
- Who are the main IP competitors for UNHCR?
- What are the main barriers/ challenges for UNHCR that might hinder a smooth market entry?
- If possible, PEST Analysis: political, economic, social and technological analysis.
- What are the regulations UNHCR has to be aware of when fundraising in Uzbekistan and Kazakhstan?

3.2 Outcome

This market analysis, with elements above considered, will define the potential for UNHCR and its Refugee Zakat Fund in Uzbekistan and Kazakhstan. Through this research, a roadmap will be proposed to roll out UNHCR's Islamic Philanthropy strategy in Uzbekistan and Kazakhstan, including:

- Market navigation: recommended fundraising approach and tactics
- Stakeholder map: prospect partners
 - HNWI's for the potential of personal Zakat
 - Islamic Foundations/ NGOs for funding potential
 - Government agencies for potential funding and advocacy
 - Corporates and Islamic Financial Institutions for the potential of corporate Zakat
 - Scholars and fatwa houses for potential endorsement

3.3 Conclusion

The research concludes with summing up the following 4 points in a report format:

- Size of Islamic philanthropy in Uzbekistan and Kazakhstan
- Funding possibilities for UNHCR in Uzbekistan and Kazakhstan
- Recommended IP approach for UNHCR in Uzbekistan and Kazakhstan
- 5-10 key stakeholders for immediate engagement in each country

3.4 Timeline

Please clearly indicate the timeline proposed to carry out the project, from information gathering through the final report.

4. Content of the offer and evaluation

Please make sure that you submit the necessary information in your technical proposal to establish compliance with the below eligibility criteria. There is no set format to present your proposal, it can be a pdf, word, power point presentation etc. Please note that a general company profile will be **NOT** be accepted, **NOR** will be the signing and stamping of UNHCR's TOR. UNHCR expects a tailored proposal ***in English*** with an associated cost (USD) per the two requirements listed in section 3.

Your proposal must be in English and compliant with the below listed criteria to be considered as compliant.

In order to be eligible to apply for this project, your company must be based EITHER in Uzbekistan OR in Kazakhstan. Please submit company registration certificate to establish compliance with these pass/fail criteria. Only offers passing this mandatory requirement will be scored technically.

4.1 Technical Evaluation LOT 1 research on the fundraising potential in Uzbekistan

The overall evaluation is based on a 100 points scale. The **Technical Proposal** will be evaluated using inter alia the following criteria and percentage distribution; **70% (i.e., max 70 points)** from the total score.

Criteria /points distribution	Documents, information to be provided to establish compliance with the set criteria. (maximum one page/criterion)
Comprehensiveness of the proposals & tailored to UNHCR requirements (max 30 points)	<p>Company must submit a clear and detailed technical proposal consisting of an executive summary for the content of market research (section 3 above).</p> <p>The submission CANNOT be a general company profile. It must showcase that the bidding firm has the expertise in the market and the ability to carry out the work outlined in section 3 above. Scores will be allocated based on the comprehensiveness and proposed strategy.</p>
Previous experience in the past 5 years (15 points)	<p>Please attach proof of similar project in the past 5 years (copy of contract/website link/work order) on the selected market (Uzbekistan).</p> <p>The scores will be allocated for the number of similar project (completed/underway).</p>
Number of clients (max 12.5 points)	<p>Provide a list of clients to include local foundations, government entities and international organisations where available.</p> <p>The scores will be allocated for the number of clients (previous/current).</p>
Account management (max 12.5 points)	<p>Describe size and structure of the company. Please include the CV of your lead consultant(s) for managing UNHCR account, as well as other team members (if any) that would be working on the study.</p> <p>The scores will be allocated for the number of years of experience of the account manager (or account management team) with relevant</p>

	experience on the Uzbek market to ensure proper market knowledge.
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If a minimum score of 45 out of 70 is not reached the proposal will be deemed technically non-compliant and will not proceed to the financial evaluation.

4.2 Technical Evaluation LOT 2 research on the fundraising potential in Kazakhstan

The overall evaluation is based on a 100 points scale. The **Technical Proposal** will be evaluated using inter alia the following criteria and percentage distribution; **70% (i.e., max 70 points)** from the total score.

Criteria /points distribution	Documents, information to be provided to establish compliance with the set criteria. (maximum one page/criterion)
Comprehensiveness of the proposals & tailored to UNHCR requirements (max 30 points)	<p>Company must submit a clear and detailed technical proposal consisting of an executive summary for the content of market research (section 3 above).</p> <p>The submission CANNOT be a general company profile. It must showcase that the bidding firm has the expertise in the market and the ability to carry out the work outlined in section 3 above. Scores will be allocated based on the comprehensiveness and proposed strategy.</p>
Previous experience in the past 5 years (15 points)	<p>Please attach proof of similar project in the past 5 years (copy of contract/website link/work order) on the selected market (Kazakhstan).</p> <p>The scores will be allocated for the number of similar project (completed/underway).</p>
Number of clients (max 12.5 points)	<p>Provide a list of clients to include local foundations, government entities and international organisations where available.</p> <p>The scores will be allocated for the number of clients (previous/current).</p>
Account management (max 12.5 points)	<p>Describe size and structure of the company. Please include the CV of your lead consultant(s) for managing UNHCR account, as well as other team members (if any) that would be working on the study.</p> <p>The scores will be allocated for the number of years of experience of the account manager (or account management team) with relevant</p>

	experience on the Kazakh market to ensure proper market knowledge.
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4.2 Financial Evaluation

The financial component is 30% (i.e. 30 points) of the total scores. The maximum score is allocated to the lowest price and the other quotes are calculated as a proportional percentage of the lowest score.

Please fill in the Financial Quotation (**Annex B**) for your price proposal. Your financial proposal must be all-inclusive, meaning that no further cost will be absorbed by UNHCR in case of selection and costs must be given in USD.

UNHCR shall pay the Vendor within thirty (30) days after satisfying completion of the Services requested. Payment shall be made against the invoice and based on the quotation submitted by the Vendor.

The selection will be based on the qualified most responsive proposal (combining technical and financial score).