

REQUEST FOR PROPOSAL

Title: CONSULTANCY ON INTERNATIONAL TRADE IN SERVICES STATISTICS

Contract reference no.: **10th EDF/ 1.1.1/SER/a/ STATS /2015**

Natural or legal persons (participating either individually or in groupings- consortium of tenderers) from ACP States and Member States of the European, are invited to submit proposals (i.e. Combined Technical and Financial) for the above mentioned contract.

The technical requirements and instructions for submitting proposals are included in this **Request for Proposal (RFP)**

When submitting tenders, tenderers must follow the instructions, forms, terms of reference, and specifications contained in this RFP and submit a tender containing the required information within the deadline specified in this RFP.

INSTRUCTIONS TO TENDERERS

1. Content of tenders

Offers, all correspondence and documents related to the tender exchanged by the tenderer and the **CARICOM Secretariat** must be written in English.

The tender must be comprised of a combined **Technical offer** and a **Financial offer**, which should be submitted electronically, using the instructions provided in **Clause 5** below.

1.1 Technical offer

The Technical offer must include the following documents:

- (1) **Tender submission form** (Annex II) using the format attached to the tender submission form. The tender submission form should indicate the name of the **individual or firm that is** making the submission.
- (2) **Organisation and methodology** to be drawn up by the tenderer using the format in **Annex III** .The 'Estimated number of working days' worksheet must be included in the Organisation and methodology.

- (3) **Key experts** (see **Annex IV**) the key experts are those whose involvement is considered to be instrumental to achieve the contract objectives. Their positions and responsibilities are defined in Section 6.1.1 of the Terms of Reference in **Annex I** and are subject to evaluation according to the evaluation grid, which is included in this RFP.

Annex IV contains the templates that tenderers must use, including:

- a) a list of the names of the key experts;
- b) the CVs of each of the key experts. Each CV should be no longer than 2 pages and only one CV must be provided for each position identified in the Terms of Reference. Note that the CVs of non-key experts must not be submitted.

The qualifications and experience of each key expert must clearly match the profiles indicated in the Terms of Reference.

Tenderers must provide the following documents for any key experts proposed:

- a copy of the diplomas mentioned in their CVs,
- a copy of employer certificates or references proving the professional experience indicated in their CVs.

Only diplomas and documented experience will be taken into account.

- (4) Non key experts may also be instrumental to achieve the contract objectives. However, they are not subject to evaluation.

2.2. Financial offer

The Financial offer must be presented as an amount in **Euro** and must be submitted using the template for the global-price version of **Annex V**.

The global price should be broken down by outputs, as indicated in the Terms of Reference.

Consultants are reminded that the maximum budget available for this contract, is **Euro 120,000**. Payments under this contract will be made in the currency of the tender.

3. Period during which tenders are binding

Tenderers are bound by their tenders for 90 days after the deadline for submitting tenders or until they have been notified of non-award. In exceptional cases, before the period of validity expires, the CARICOM Secretariat may ask tenderers to extend the period for a specific number of days, which may not exceed 40.

The selected tenderer must maintain its tender for a further 60 days. A further period of 60 days is added to the validity period irrespective of the date of notification.

4. Additional information before the deadline for submitting tenders

Tenderers may submit questions in writing to the following address up to 7 days before the deadline for submission of tenders, specifying the publication reference and the contract title:

Programme Manager, Administrative Services
CARICOM Secretariat

Turkeyen, Greater Georgetown

Guyana

Fax: 592-222-0080

Email: procurement@caricom.org

The CARICOM Secretariat has no obligation to provide clarification after this date (i.e. 7 days before the closing date).

Any clarification of the RFP will be communicated simultaneously in writing to all tenderers at the latest, 4 calendar days before the deadline for submitting tenders.

5. Submission of tenders

6. Tenderers are expected to submit a combined Technical and Financial Proposal (i.e. both proposals should be submitted together, using the forms referred to in Clauses 1.1 and 2.2 .Tenders may be submitted **electronically**, on or before **11 December, 2015** at **16:00 hrs**, for the attention of the :

Programme Manager, Administrative Services

CARICOM Secretariat

Turkeyen, Greater Georgetown

Guyana

Email: procurement@caricom.org

7. Amending or withdrawing tenders

Tenderers may amend or withdraw their tenders by written notification prior to the deadline for submitting tenders. Tenders may not be amended after this deadline.

8. Costs for preparing tenders

No costs incurred by the tenderer in preparing and submitting the tender are reimbursable. All such costs must be borne by the tenderer, including the cost of interviewing proposed experts.

9. Ownership of tenders

The CARICOM Secretariat retains ownership of all tenders received under this tender procedure. Consequently, tenderers do not have the right to have their tenders returned to them.

10. Evaluation of tenders

9.1 Evaluation of technical offers

The quality of each technical offer will be evaluated in accordance with the award criteria and the weighting detailed in the evaluation grid, which is provided below:

	Maximum	Assessment
Organisation and methodology		

Rationale	5	
Strategy	50	
Involvement of all other experts	5	
Timetable of activities, including the number of expert days proposed	10	
Total Score (Organisation and methodology)	70	
Key Expert(Maximum Score 30)		
Qualifications	10	
General Experience	10	
Specific Experience	10	
Total score Key Expert	30	
Overall total score	100	

The award criteria will be examined in accordance with the requirements indicated in the Terms of Reference

9.2 Evaluation of financial offers

Upon completion of the technical evaluation, the financial offers for tenders that were not eliminated during the technical evaluation will be considered (i.e. those with an average score of 75 points or more).

10. Choice of selected tenderer

The best value for money is established by weighing technical quality against price on an 80/20 basis.

11 Ethics clauses / Corruptive practices

- a) Any attempt by a tenderer to obtain confidential information, enter into unlawful agreements with competitors or influence the Evaluation Committee or the CARICOM Secretariat during the process of examining, clarifying, evaluating and comparing tenders will lead to the rejection of its tender and may result in administrative penalties.
- b) The tenderer must not be affected by any conflict of interest and must have no equivalent relation in that respect with other tenderers or parties involved in the project.
- c) The CARICOM Secretariat reserves the right to suspend or cancel project financing if corrupt practices of any kind are discovered at any stage of the award process or during the execution of a contract. For the purposes of this provision, 'corrupt practices' are the offer of a bribe, gift, gratuity or commission to any person as an inducement or reward for

performing or refraining from any act relating to the award of a contract or execution of a contract already concluded with the CARICOM Secretariat.

- d) Tenders will be rejected or contracts terminated if it emerges that the award or execution of a contract has given rise to unusual commercial expenses. Such unusual commercial expenses are commissions not mentioned in the main contract or not stemming from a properly concluded contract referring to the main contract, commissions not paid in return for any actual and legitimate service, commissions remitted to a tax haven, commissions paid to a payee who is not clearly identified or commissions paid to a company which has every appearance of being a front company.

Consultants found to have paid unusual commercial expenses on projects funded by the CARICOM Secretariat are liable, depending on the seriousness of the facts observed, to have their contracts terminated or to be permanently excluded from contracts of the CARICOM Secretariat. The CARICOM Secretariat reserves the right to suspend or cancel the procedure, where the award procedure proves to have been subject to substantial errors, irregularities or fraud. If substantial errors, irregularities or fraud are discovered after the award of the Contract, the CARICOM Secretariat may refrain from concluding the Contract.

11. Signature of contract(s)

11.1. Notification of award

The successful tenderer will be informed in writing that its tender has been accepted.

11.2. Signature of the contract(s)

Within 20 days of receipt of the contract signed by the CARICOM Secretariat, the selected tenderer shall sign and date the contract and return it to the CARICOM Secretariat.

12. Cancellation of the tender procedure

In the event of cancellation of the tender procedure, the CARICOM Secretariat will notify tenderers of the cancellation. If the tender procedure is cancelled before the outer envelope of any tender has been opened, the unopened and sealed envelopes, may be returned to the tenderers, if requested.

Secretariat cannot be liable for any damages whatsoever including, without limitation, damages for loss of profits, in any way connected with the cancellation of a tender procedure, even if the CARICOM Secretariat has been advised of the possibility of damages. The publication of a RFP does not commit the CARICOM Secretariat to implement the programme or project announced.

Annex II-

CONSULTANCY ON INTERNATIONAL TRADE IN SERVICES STATISTICS

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LIST OF ACRONYMS AND ABBREVIATIONS

AGS	Advisory Group on Statistics
BMP6	Balance of Payments Manual Version 6
CARICOM	Caribbean Community
CARTAC	Caribbean Regional Technical Assistance Centre

CCS	Caribbean Community Secretariat
CESAP	CARICOM Economic Statistics Action Plan
CSME	CARICOM Single Market and Economy
ECCB	Eastern Caribbean Central Bank
ECLAC	Economic Commission for Latin America and the Caribbean
EDF	European Development Fund
EU	European Union
GDP	Gross Domestic Product
GIS	Geographic Information Systems
ICT	Information and Communication Technology
ICP	International Comparison Programme
IDB	Inter-American Development Bank
IDPs	International Development Partners

IT	Information Technology
MRDS	Minimum Required Data Set
NSDS	National Strategy for the Development of Statistics
NSOs	National Statistical Offices
PARIS21	Partnership in Statistics for Development in the Twenty- First Century

LIST OF ACRONYMS AND ABBREVIATIONS

RSWP	Regional Statistical Work Programme
SNA	System of National Accounts
UNSD	United Nations Statistics Division

1. BACKGROUND INFORMATION

1.1 Beneficiary Country

All Member States of the Community.

1.2 Contracting Authority

The Caribbean Community Secretariat will be the Contracting Authority.

1.3 Relevant Country Background

The Caribbean Community and Common Market was established in 1973 by the Treaty of Chaguaramas. In 1989, the Heads of Government of the Caribbean Community (CARICOM) declared their intention to deepen the integration process and to strengthen the Caribbean Community in all its dimensions through the establishment of the CARICOM Single Market and Economy (CSME). The CSME was supposed to be one aspect of the response to the challenges and opportunities presented by the changes in the global economy. For this purpose the Revised Treaty of Chaguaramas establishing the Caribbean Community including the CSME was signed by the Heads of Government in 2001. The fundamental objective of the CSME is to achieve a single economic space that will foster growth and will result in sustained development of the standard of living of all Caribbean peoples. The Single Market was established in 2006 and comprises all Member States except The Bahamas, Montserrat and Haiti. Key elements of the CSME are - **Free Movement of Capital, Labour, Goods, and the Provision of Services and the Right of Establishment within Member States of the CSME.**

In July 2009, officials and stakeholders from a wide cross-section of the Services Sector within the CSME identified nine (9) broad elements which should be addressed in a Regional Strategic Plan for Services. During that year, also, the Council for Trade and Economic Development (COTED) established the national and regional institutional arrangements: **National Focal Points (NFP)**, **National Focal Point Persons (NFPP)**, **National Coordinating Committees (NCC)** and the **Regional Services Project Steering Committee (RSPSC)** respectively, for the Preparation of the Plan. The Plan is expected to cover all Services.

In 2010, the COTED, based on recommendations of the Regional Steering Committee, approved eleven (11) elements which should be addressed by the Plan, namely –

- (i) **External Environment;**
- (ii) **Goal;**
- (iii) **Policy Framework;**
- (iv) **Legislative Framework;**
- (v) **Incentives;**
- (vi) **Human Resource Requirements;**
- (vii) **Financial Requirement;**
- (viii) **Technological Needs;**
- (ix) **Cross-Sectoral Linkages;**
- (x) **Constraints;**
- (xi) **Other.**

The COTED also identified seven (7) sub-sectors for which priority attention would be given:

- (i) **Financial Services;**
- (ii) **Information and Communication Technology Services;**
- (iii) **Professional Services;**
- (iv) **Tourism Services;**
- (v) **Education Services;**
- (vi) **Health and Wellness Services;**
- (vii) **Recreational, Cultural and Sporting.**

1.4 Current State of Affairs in the Relevant Sector

The implementation of the CSME requires statistical information to guide and monitor its progress of integration and to assess its impact and achievements. In recent years weaknesses in the statistical systems in the Region have been addressed through a number of initiatives executed by the CARICOM Secretariat with the support of the Standing Committee of Caribbean Statisticians (SCCS) and its sub-group, the

CARICOM Advisory Group on Statistics (AGS). Initiatives in statistics were also implemented by a number of International Development Partner sometimes in collaboration with the CARICOM Secretariat. These initiatives were geared to improve the range and quality of statistics and were supported by a number of International Development Partners (IDPs) culminating with significant support from the European Union under the Ninth European Development Fund (Ninth EDF), Caribbean Integration Support Programme. Support to the strengthening of statistical systems in the Region under the Ninth EDF targeted three results areas which were: Intra-regional statistical infrastructure harmonised; Statistical programming and production and dissemination of key Economic Statistics improved and Training delivered and Economic Statistics used in the monitoring of the Regional Integration Process.

Some of the key achievements under the result on the *harmonising of the intra-regional statistical infrastructure* included improvement in the SCCS as a decision-making forum through streamlining of the organisation and conduct of its meetings; the revision of its Terms of Reference and Rules of Procedure in accordance with best practices and the support to the functioning of the AGS that followed up and advanced the decisions of the SCCS.

In the area of Trade in Services Statistics, support was provided under The Ninth EDF project – Develop and Implement the CARICOM Economic Statistics Action Plan – Trade in Services and Investment Statistics, which sought to build on past projects that were previously executed by the CARICOM Secretariat in the Region in collaboration with other developmental partners in order to improve the quality of services data and to build capacity in this area. The activities were aimed at harmonising an approach to data collection through the use of common classifications and methodologies. Focus was placed on the imports and exports of services according to the Balance of Payments Manual- Fifth Edition (BPM5) and Extended Balance of payments (EBOPS) out of the Manual of Statistics in Trade in Services (MSITS) 2002; the provision of in-country technical assistance and training as well as stakeholder sensitization and the assessment of the availability of appropriate data capture mechanisms to compile and disseminate statistics of International Trade in Services and Investment Flows in the Region. Strengthening of statistics on production of services was supported through two consultancies, the first which produced an assessment report and an action plan and based on recommendations in the action plan the second consultancy sought to deliver technical assistance and training with focus on the System of National Accounts 1993 (1993 SNA).

However, there are still gaps that need to be addressed in all the areas towards further strengthening and improvement of the harmonization of statistics in the region. In addition the international standards for the compilation of National Accounts, Balance of Payments and Statistics on International Trade in Services have since been updated with the 2008 SNA, BPM6 and the MSITS 2010 respectively. In the area of Trade in Services Statistics, work will continue to improve the compilation of statistics on International Trade in Services, according to the EBOPS classification, based on the MSITS 2010.

The current project will target the following -

- (a) **to further improve** and bridge the data gaps that exists in the Region at the level of the Extended Balance of Payment Services (EBOPS) classification, as recommended in the Manual of Statistics on International Trade in Services (MSITS) 2010;
- (b) **to reinforce and enable** the implementation of frameworks that have been produced under the Ninth EDF such as the refinement and pilot testing in selected countries of the Common Core Trade in Services Questionnaire(s) to compile detailed additional data on intra/extra regional trade in services statistics and data by modes of delivery for selected areas of statistics on trade in services;
- (c) **to focus** on key areas of trade in services statistics in keeping with the regional priority sectors identified by the Twenty-Ninth Meeting of the COTED;
- (d) **to provide** support through the recruitment of consultants/project assistants to support data compilation in selected countries requiring such support and at the CARICOM Secretariat.

1.5 Related Programmes and Other Donor Activities

The area of services has benefitted from prior interventions from CIDA, USAID and more recently the European Union under the Ninth European Development Fund (Ninth EDF), Caribbean Integration Support Programme which was to support the statistical information required to guide and monitor the implementation of the CARICOM Single Market and Economy (CSME). A baseline situational assessment was conducted and individual CARICOM Economic Statistics Action Plan (CESAPs) was developed for each country visited by the consultant as well as an overall CESAP. The common guidelines document was revised and the instrument for the

collection of more detailed data was drafted. A regional training workshop was also conducted to inform on the conceptual framework for the compilation of these statistics and to discuss the draft questionnaire. Some Member States have been able to provide statistics in accordance with the EBOPS 2002 classification format.

2. OBJECTIVE, PURPOSE AND EXPECTED RESULTS

2.1 Overall Objective

The overall objective is to **provide the decision-makers in CARICOM with core, high quality statistics for the establishment and monitoring of the CSME.**

2.2 Purpose

The purpose of the project is **to develop and strengthen the capacity of the regional and national statistical systems to produce and disseminate harmonized statistics on Trade in Services and Investment Flows in accordance with international and regional recommendations.** This project also seeks to promote a harmonised approach to data collection through the use of common guidelines and methodological approaches.

The aim is to improve the capacity to measure the sectoral contribution of international flows of services to the economy. The project will also assess the impact of services, support the process of capacity building and methodological improvement in increasing the scope of investment statistics, as well as inflows and outflows of investment by source/destination; country (intra/extra regional, industry and type of investment).

2.3 Results to be achieved:

2.3.1 Overall Result:

Production of trade in services statistics at the level of the EBOPS including the main categories, relevant sub-components and related supplementary items, improved.

2.3.2 Specific Results

- (i) Situational Assessment and corresponding work plan based on findings on the status of Statistics on International Trade in Services (specifically with respect to the priority services sector for which Regional Strategic Plans are being prepared) in countries produced for pilot countries ;
- (ii) Capacity-building on the production of Statistics on International Trade in Services Statistics conducted consistent with the status in countries;
- (iii) Common Core Trade In Services Questionnaire (s) focusing on the compilation of services statistics at the level of the EBOPS and disaggregation and on trading partners refined in accordance with the Manual on Statistics of International Trade in Services 2010 (MSITS2010);
- (iv) Refined Common Core Trade in Services Questionnaire (s) pilot-tested in specific countries and a report on the findings prepared;
- (v) With reference to (ii), Trade in Services statistics at the level of the EBOPS strengthened in-country to improve the quality of the data and to bridge existing data gaps for relevant sub-components and supplementary items and by trading partners;
- (vi) Regional training workshop facilitated to enable harmonisation and the sharing of best practices with respect to Services Statistics at the level of the EBOPS based on items (i) – (vi) above;
- (vii) Use of Trade in Services Statistics by key stakeholders improved through training/ sensitization in-country/regionally;
- (viii) Process of building capacity in countries including the successes, best practices as well as challenges documented and disseminated.

3. ASSUMPTIONS AND RISKS

3.1 Assumptions underlying the project intervention

The assumptions and risks associated with this contract are those attributed to the project of which the contract is a part, viz:

- (i) Member States facilitate country visits for technical assistance missions with the Consultant in an organised and timely manner;
- (ii) Member States assign and make available counterparts from the NSOs and other key agencies responsible for the developmental work in the area of National Accounts/Short-term Indicators and related areas;
- (iii) Member States are able to undertake the relevant preparatory and follow up work before and after the technical assistance missions and training workshop(s) in order to realise the project results;
- (iv) Consultants are able to work individually in country to deliver the required technical assistance.

3.2 Risks

- (i) NSOs are not supplied with the requisite resources to undertake the improvements recommended in the technical assistance and training activities;
- (ii) Lack of timely response by Member States;
- (iii) Scheduling of vacation by counterparts in Member States during planned country missions may affect the execution of these missions;
- (iv) The occurrence of natural disasters in the Region may inhibit the implementation of the project as planned.

4. SCOPE OF THE WORK

4.1 General

4.1.1 Project description

The project will utilise the services of a consultant to conduct a situational assessment in the seven (7) pilot countries on the status with respect to statistics in the priority areas that have been identified and to review and formulate a work plan for the provision of the required technical assistance and training to assist countries in filling the data gaps in Trade in Services Statistics. Key aspects of this support are the obtaining of more detailed data on Trade in Services as well as information by direction of trade, trading partners and intra/extra-regional trade.

The Consultant will also be required to revise and update the questionnaire on Trade in Services Statistics; pilot-test the questionnaire (or sector specific questionnaires) in the seven (7) pilot countries; provide technical assistance in these countries to improve the statistics on Trade in Services Statistics. The Consultant will also have to facilitate a Regional Workshop to reinforce and harmonise the in-country technical assistance in order to enable the production of comparable services Statistics across countries and in the sharing of best practices across all countries.

The work to be undertaken under the consultancy should be in accordance with the Manual on Statistics of International Trade in Services 2010 (MSITS 2010). The Extended Balance of Payments Services Classifications (EBOPS) including supplementary items and the Foreign Affiliate Statistics (FATS) are critical aspects of this support.

The project will focus on building the capacity of the Regional and National statistical Systems for the collection, compilation, analysis and dissemination of international trade in services statistics, in accordance with international and regional recommendations.

The project's interventions will build on work already undertaken in the Region as summarised in Section 1.4. Further, wherever possible collaborative work would be undertaken with key partners as occurred under the Ninth EDF. It is anticipated that at the national level the intervention will also target key users, producers, suppliers of services statistics and other stakeholders relative to sensitizing and informing about the progress of the project and the implications for the resulting estimates and for the data to be provided.

While general support is to be provided to all services sector, there are priority sectors that will be targeted for support. The priority services sectors to be addressed under this consultancy are: Financial Services; Professional Services; Information Communication Technology (ICT); Cultural and Entertainment Services; Health and Wellness Services; Sports Services; Education Services and Tourism Services. This focus does not however preclude general or specific support to other areas of statistics that are needed or which may particularly relevant to countries.

4.1.2 Geographical area to be covered

Member States of the Caribbean Community are to be covered in this Project

4.1.3. Target group

The target group comprises personnel in NSOs and other relevant producing agencies/organisations as well as key users of statistics.

4.2 Specific Activities

Preparatory Activities –Part I- Situational Assessment

Part I -Preparatory Activities – Inception Phase –

- (i) **Engage** in a Briefing Meeting with the Project Director, Regional Statistics, the Deputy Programme Manager, Services and relevant staff on the objectives, activities, expected outputs and on any issues related to the execution of the project that require clarification;
- (ii) **Prepare** and **submit** an Inception Report based on the clarifications provided at the Briefing Meeting inclusive of a detailed work plan with timelines for completing the activities of the consultancy.
- (iii) **Review** the framework and the recommendations from the reports of the prior technical assistances undertaken as well as information from other sources on the status of statistics in Trade in Services in the Region.

Part II-Situational Assessment and Work Plan

- (iv) **Undertake** a situational assessment in the pilot countries to obtain information on the status of the production of Trade in Services Statistics in these countries;

- (v) **Prepare** a report on the situational assessment and other relevant information and develop a Work Plan to inform on the activities relative to the results to be achieved under the project and any adjustments that may be required;

Part III – Technical Assistance, Regional Training and related activities

- (i) **Develop/Refine** the Trade in Services Questionnaire (s), that was an output of prior support, relative to the collection of more detailed data on sub-components/related supplementary elements of the EBOPS on specific services sectors and by trading partners;
- (ii) **Undertake *in-country Technical Assistance***, in accordance with the MSITS 2010 in the following areas:
- a. **Pilot-test** the proposed questionnaire (s) in countries in the identified sectors (or other sectors as feasible) to:
 - **assess the possibility of** compiling Trade in Services Statistics by Direction of Trade by Country, Trading Blocs, Intra and Extra Regional ;
 - Estimation of Trade in Services Statistics by Mode of Delivery where feasible;
 - **Bridge** the data gaps by providing additional detailed data at the level of the sub-components/supplementary items of the; EBOPS ;
 - **Provide** assistance to countries in the compilation of any statistics that are available and in the production of a Trade in Services publication;
 - b. **Provide** training to the relevant Members States to sustain the production of the EBOPS sub components/supplementary items;
 - c. **Provide** assistance to countries in the compilation of statistics and production of a national publication on Trade in Services Statistics
 - d. **Facilitate** the conduct of National Training/Sensitisation Workshop(s) for key users, producers, and suppliers of these statistics in-country;

- (iii) **Facilitate** the conduct of a Regional Training Workshop to enable the sharing of best practices/harmonisation with respect to the technical assistance and pilot-testing of the questionnaire (s);
- (iv) **Prepare** reports on the Technical Assistance put in place in countries and on the sensitization activities;
- (v) **Prepare** reports as required on the Regional Training Workshop(s);
- (vi) **Prepare** a Draft Report of all activities undertaken under the project;
- (vii) **Prepare** a Final Report of all activities and after feedback from the CARICOM Secretariat, Member States and other relevant stakeholders on the results achieved and recommendations for further work.

4.3 Project Management

4.3.1 Responsible body

The CARICOM Secretariat Regional Statistics Programme will be responsible for managing the project.

4.3.2 Management structure

The Project Director, Regional Statistics, will be the Project Manager/ Supervisor and will have direct responsibility for the project. The Project Director reports to the Deputy Secretary-General of the CARICOM Secretariat, who will have overall responsibility for the project. The Project Director will be supported by the Deputy Programme Manager, Regional Statistics, the Deputy Programme Manager, Services of the Trade and Economic Integration Directorate, and by other staff of the Regional Statistics Programme and Services Programme. The proposed support under the Tenth EDF has been presented to the AGS and the SCCS and progress reports will be presented to these bodies during the lifetime of the project. The AGS makes recommendations to the

SCCS which will therefore give advice to the CARICOM Secretariat on the project execution.

4.3.3 Facilities to be provided by the Contracting Authority and/or other parties

The Contracting Authority will provide reasonable office accommodation in accordance with the schedule of activities required by these terms of reference. The boundaries of the office accommodation will be delineated at the inception meeting. Office accommodation in Member States will also be the subject of clarification at a later date.

5. LOGISTICS AND TIMING

5.1 Location

The home base for the Consultant will be Barbados and the Consultant would visit periodically at the CARICOM Secretariat and the NSOs of Member States throughout the duration of the contract and shall interact with the Project Director of Statistics either directly or by email and other electronic communication. However, the nature of the project requires the presence of the Consultant(s) on a consistent basis in Member States during its execution to deliver technical assistance and to facilitate the regional training workshops.

5.2 Commencement date and Period of execution

The intended commencement date is **January 2 2016** and the period of execution of the contract is 150 days for the implementation of the programme in countries over a total period fourteen **(14) months**

6. REQUIREMENTS

6.1. Personnel

6.1.1. Key experts

All experts who have a crucial role in implementing the contract are referred to as key experts. The profiles of the key experts for this contract are as follows:

Key Expert: Trade in Services Statistics Expert

Qualifications

Bachelor's Degree in Statistics, Mathematics, Economics, or a related discipline such as Development Studies (Economics major);

Post-graduate Diploma in National Accounts or other post-graduate degree such as a Master's Degree in National Accounts, Statistics, Mathematics or in a related discipline such as Development Studies (Economics major).

General professional experience

- (i) At least ten (10) years working in the areas of Trade in Services;
- (ii) At least five (5) years experience in executing major projects in the field of Economic Statistics, particularly Services Statistics;
- (iii) At least five (5) years experience working in or with (through projects) a regional or international organisation;
- (iv) Excellent knowledge and practical experience of the Balance of Payments Manuals up to version 6 (BPM 6), the Extended Balance of Payments Services

(EBOPS) Classification and the Manual on Statistics of International Trade in Services 2010;

- (v) Sound knowledge and experience in the understanding and preparation of common guidelines and methods for the production of Trade in Services and Investment Flows Statistics
- (vi) Excellent computer skills;
- (vii) Excellent written and oral communication skills in English;
- (viii) Management or Strategic Planning experience will be an asset;
- (ix) Project Management skills will also be an asset.

Specific professional experience

- (i) At least ten (10) years working in the areas of National Accounts including: Balance of Payments systems, Trade in Services and Foreign Direct Investment Statistics or in any combination of these areas as reflected ;
- (ii) At least five years experience in Quality assessment and management of statistical procedures and output;
- (iii) At least five (5) years practical experience in the development of Service Statistics at the country level

6.1.2. Other experts

CVs for experts other than the key experts are not examined prior to the signature of the contract. They should not have been included in the tender. The Consultant shall select and hire other experts as required according to the profiles identified in the Organisation and Methodology. These profiles must indicate whether they are to be regarded as key/non-key experts and senior/junior so that it is clear which fee rate in the budget breakdown will apply to each profile. All experts must be independent and free from conflicts of interest in the responsibilities accorded to them. The selection procedures used by the Consultant to select these other experts shall be transparent, and shall be based on pre-defined criteria, including professional qualifications, language skills and

work experience. The findings of the selection panel shall be recorded. The selection of experts shall be subject to approval by the Contracting Authority.

Note that civil servants and other staff of the public administration of the beneficiary country cannot be recruited as experts, unless prior written approval has been obtained from the European Commission.

6.1.3. Support staff and backstopping

Backstopping costs are considered to be included in the fee rates. The costs of support staff must be included in the fee rates of the experts.

6.2 Office Accommodation

The Consultant would provide office accommodation and services for his/her activities in his/her country of origin for work done other than during visits to the Member States of the Caribbean Community. E-mail contact for continuous communication with the CARICOM Secretariat Regional Statistics Programme must also be provided as well as a contact person for follow up in the event that the Consultant will not be available to respond to the Regional Statistics Programme of the CARICOM Secretariat during the period when the contract is in force.

6.3 Facilities to be provided by the Consultancy

The Consultancy shall ensure that experts are adequately supported and equipped. In particular the Consultancy shall ensure that there is sufficient administrative, secretarial and interpreting provision to enable experts to concentrate on their primary responsibilities. The Consultancy must also transfer funds as necessary to support its activities under the contract and to ensure that its employees are paid regularly and in a timely fashion.

If the Consultancy is a consortium, the arrangements should allow for the maximum flexibility in project implementation. Arrangements offering each consortium member a fixed percentage of the work to be undertaken under the contract should be avoided.

6.4 Equipment

No equipment is to be purchased on behalf of the Contracting Authority / beneficiary country as part of this service contract or transferred to the Contracting Authority / beneficiary country at the end of this contract. Any equipment related to this contract which is to be acquired by the beneficiary country must be purchased by means of a separate supply tender procedure.

7. REPORTS

7.1 Reporting requirements

Please refer to Article 26 of the General Conditions. There must be a final report, a final invoice and the financial report accompanied by an expenditure verification report at the end of the period of implementation of the tasks. The draft final report must be submitted at least one month before the end of the period of implementation of the tasks. Note that these interim and final reports are additional to any required in Section 4.2 of these Terms of Reference (which are restated below). Each report shall consist of a narrative section and a financial section. The financial section must contain details of the time inputs of the experts, of the incidental expenditure and of the provision for expenditure verification.

The following reports should be provided based on activities undertaken in pursuance of the contract activities:

- (i) **Preparation and submission** of an Inception Report – not later than 10 days after the commencement of the contract;
- (ii) **Preparation and submission** of a detailed Work Plan to complete all of the activities in the Terms of Reference 10 days after approval of the Inception report;

- (iii) **Completion and submission** of Interim Reports on the review of the updated framework for the compilation of Services Statistics and on the refinement of the questionnaire to compile more detailed data 15 days after approval of the Work Plan;
- (iv) **Completion and submission** of Interim Reports on the delivery of country technical assistance including the pilot-testing of the questionnaire(s); national level training and sensitisation; documentation of the successes, best practices, challenges and follow-up required, 15 days after the completion of all technical assistance;
- (v) **Submission** of a workshop report fifteen days after completion of the workshop;
- (vi) **Submission** of a Draft Final Report of all the activities undertaken in the terms of reference two calendar month after the implementation of all activities;
- (vii) **Submission** of an expenditure verification report at the times to be specified including at the end of the period of implementation of the tasks (15 days after completion of all the tasks);
- (viii) **Submission** of the Final Report no later than 20 days after the submission of the draft reports and incorporating feedback from the CCS and Member States.

7.2 Submission and approval of progress reports

Three copies of the reports referred to above must be submitted to the Project Manager identified in the contract. The progress reports must be written in English. The Project Director is responsible for approving all reports.

8. MONITORING AND EVALUATION

8.1 Definition of indicators

- (i) Inception Report;
- (ii) Report on Situational Assessment and Work Plan ;
- (iii) Revised questionnaires/sectoral questionnaires;

- (iv) Report on pilot-testing of questionnaires
- (v) Reports on technical assistance missions in the specific Member States incorporating successes, best practices, challenges and follow-up required among other issues;
- (vi) Reports on other capacity-building activities conducted;
- (vii) Presentations at regional and national workshops on Services Statistics;
- (viii) Draft Project Report;
- (ix) Final project report.

8.2 Special requirements

None

APPENDIX 1

LIST OF CARICOM MEMBER STATES

Antigua and Barbuda

The Bahamas

Barbados

Belize

Dominica

Grenada

Guyana

Haiti

Jamaica

Montserrat

Saint Lucia

St. Kitts and Nevis

St. Vincent and the Grenadines

Suriname

Trinidad and Tobago

ANNEX II- TENDER SUBMISSION FORM

Ref:

Contract title:

1 SUBMITTED by (i.e. the identity of the Tenderer)

	Name(s) and address(es) of legal entity or entities submitting this tender	Nationality ⁱ
Leader ⁱⁱ		
Member ²		
Etc ...		

2 CONTACT PERSON (for this tender)

Name	
Organisation	
Address	
Telephone	
Fax	
E-mail	

3 STATEMENT

I, the undersigned, being the authorised signatory of the above tenderer, hereby declare that I have examined and accept without reserve or restriction the entire contents of the Request for Proposal for the tender procedure referred to above.

I am fully aware that, in the case of a consortium(for e.g. a group of individuals), the composition of the consortium cannot be modified in the course of the tender procedure, unless prior approval is given in writing. I am also aware that the consortium members would have joint and several liability towards CARICOM concerning participation in both the above tender procedure and any contract awarded to me as a result of it.

Signed on behalf of the tenderer

Name	
Signature	

Date	
------	--

ANNEX III - ORGANISATION & METHODOLOGY

To be completed by the tenderer

Please provide the following information:

Rationale

- Any comments you have on the Terms of Reference for the successful execution of activities, in particular regarding the objectives and expected results, thus demonstrating the degree of understanding of the contract. Your opinion on the key issues related to the achievement of the contract objectives and expected results.
- An explanation of the risks and assumptions affecting the execution of the contract.

Strategy

- An outline of the approach proposed for contract implementation.
- A list of the proposed tasks you consider necessary to achieve the contract objectives.
- Inputs and outputs.

Involvement of all members of the team

- If a tender is submitted by a consortium, a description of the input from each member of the consortium and the distribution and interaction of tasks and responsibilities between them. Furthermore, the involvement of all members of the consortium will be considered added value in the tender evaluation. If the tender is submitted by a single company, the total of available points for this part in the evaluation grid will be allocated.

Timetable of work

- The timing, sequence and duration of the proposed tasks, taking into account travel time.
- The identification and timing of major milestones in executing the contract, including an indication of how the achievement of these would be reflected in any reports, particularly those stipulated in the Terms of Reference.

ANNEX IV- KEY EXPERTS

Name of expert	Proposed position	Years of experience	Age	Educational background	Specialist areas of knowledge	Experience in beneficiary country	Languages and degree of fluency (VG, G, W)

CURRICULUM VITAE

Proposed role in the project:

Family name:

First names:

Date of birth:

Nationality:

Civil status:

Education:

Institution (Date from - Date to)	Degree(s) or Diploma(s) obtained:

Language skills: Indicate competence on a scale of 1 to 5 (1 - excellent; 5 - basic)

Language	Reading	Speaking	Writing

Membership of professional bodies:

Other skills: (e.g. Computer literacy, etc.)

Present position:

Years within the firm:

Key qualifications: (Relevant to the project)

Specific experience in the region:

Country	Date from - Date to

Professional experience

Date from - Date to	Location	Company& reference person ¹ (name & contact details)	Position	Description

Other relevant information (e.g., Publications)

¹ The Caribbean Community reserves the right to contact the reference persons. If you can not provide a reference, please provide a justification.

ANNEX V: BUDGET

Global price:< currency> <amount>

Please include a price breakdown based on the outputs/deliverables in the Terms of Reference.

ⁱ Country in which the legal entity is registered.

ⁱⁱ Add / delete additional lines for consortium members as appropriate. If this application is being submitted by an individual legal entity, the name of that legal entity should be entered as 'Leader' (and all other lines should be deleted).