



ORGANISATION OF EASTERN CARIBBEAN STATES

INVITATION FOR EXPRESSIONS OF INTEREST

ACPEU/TradeCom II Programme, "Consolidating the OECS Economic Union through Sustainable Trade Capacity Building"

Grant No.: FED/2019/405-401

Assignment Title: Consultancy Services to Develop a Regional OECS Private Sector Trade Facilitation and Engagement Strategy to Facilitate Deeper Integration of OECS Protocol Member States into Global Markets

Reference No. LC-OECS Commission-IC-PSTF.

The Organisation of Eastern Caribbean States (OECS) Commission invites interested eligible **Individual Consultants** to submit Expressions of Interest for the provision of Consultancy Services to **Develop a Regional OECS Private Sector Trade Facilitation and Engagement Strategy to Facilitate Deeper Integration of OECS Protocol Member States into Global Markets** under the Consolidating the OECS Economic Union through Sustainable Trade Capacity Building Project.

The Terms of Reference and Guidelines for the Submission of Expressions of Interest for this consultancy are provided below.



**THE ORGANISATION OF EASTERN CARIBBEAN STATES COMMISSION
ECONOMIC DEVELOPMENT AND TRADE POLICY UNIT**

TERMS OF REFERENCE

**CONSULTANCY SERVICES
TO**

**DEVELOP A REGIONAL OECS PRIVATE SECTOR TRADE FACILITATION AND
ENGAGEMENT STRATEGY TO FACILITATE DEEPER INTEGRATION OF OECS
PROTOCOL MEMBER STATES INTO GLOBAL MARKETS**

Background

The Organisation of the Eastern Caribbean States (OECS)

The Organization of Eastern Caribbean States (OECS) was established in 1981 when the Treaty of Basseterre was signed. The primary objectives of this inter-governmental organization are to promote cooperation, harmonization, and integration among its Member States. The Revised Treaty of Basseterre (RTB), signed on 18th June 2010, further reaffirmed the commitment of the OECS Member States to deepening the regional integration process through establishment of a full economic union (Eastern Caribbean Economic Union – ECEU) and ensuring that Member States continue to adopt a common approach to trade, health, education and the environment, as well as to the development of such critical sectors as agriculture, tourism and energy.

OECS Member States are committed to the goal of advancing global participation, dialogue and regionalisation. However, as the OECS region deepens its thrust to integrate with the global economy, its trade-related technical assistance and capacity building needs have been magnified. The Eastern Caribbean Economic Union (ECEU) is in a unique position among Small Island Developing States (SIDS) as the RTB accords the Organization with exclusive competence for trade policy. According to the RTB, the Protocol Member States have committed to act as a single entity in the coordination and articulation of their trade policy, through the OECS Commission. Emerging circumstances within the national, regional and global contexts provide more impetus to accelerate the transition by Protocol Member States from a national to a regional approach to treat with trade policy.

Discussions over the nature of an African, Caribbean, Pacific – European Union (ACP-EU) relationship post-Cotonou, including the framework for future cooperation among the countries, are already challenging the resource capabilities of the OECS Member States. Given the weight of the United Kingdom in the export profile for the OECS Member States, these resource constraints are further evidenced by significant risks posed to the Member States as they explore options to respond to the formal exit of the United Kingdom from the European Union ("Brexit challenge") and manage the complicated relationship between the UK and the EU in financial services and remittance flows, *inter alia*. Furthermore, as traditional markets attempt to increase protectionist measures, there is greater impetus for emphasis on South-South cooperation on matters of trade and new forms of cooperation in areas such as trade logistics, trade infrastructure and trade facilitation. OECS trade policy, therefore, must strategically position the ECEU to enhance its global market integration.

Guided by its six strategic objectives, therefore, the OECS works across its programmatic areas and in all Member States to consolidate the single economic space for enhanced economic growth, social inclusion and environmental protection through, *inter alia*, initiatives aimed at:

- a) deepening and maximizing the participation of Member States in accordance with the Treaty of Basseterre (1981) and the Revised Treaty of Basseterre (RTB) establishing the Eastern Caribbean Economic Union (ECEU) (2010) while also taking into consideration the provisions of the CARICOM Revised Treaty of Chaguaramas;
- b) consolidating the architecture of regional integration through strengthening, restructuring and distribution of the Organs of integration for efficiency, cost effective operation and effectiveness;
- c) facilitating the free movement, growth and development of people, goods, services and capital; and
- d) driving key economic priorities: giving attention to food security and production, energy, transportation, job creation and climate change/disaster management.

The RTB therefore places the ECEU in a unique position to adopt regional approaches to analyse and measure the aggregate effect of trade on the Economic Union, as the RTB enables its Protocol Member States¹ to accord the OECS exclusive competence for trade policy. Moreover, these Member States have committed to act cohesively in the coordination and articulation of their trade policy, under the technical guidance of the OECS Commission.

ACP TradeCom II Programme – Sustainable Trade Capacity Building (STCB) Project

¹ Antigua and Barbuda, Dominica, Grenada, Montserrat, St. Kitts and Nevis, Saint Lucia, St. Vincent and the Grenadines

The OECS Commission has secured funding under the EU-funded ACP TradeCom II Programme to implement a regional project, "Consolidating the OECS Economic Union through Sustainable Trade Capacity Building" (STCB), to assist Member States and the OECS Commission to fully implement the OECS Economic Union in order to deepen regional integration and facilitate integration of the Protocol Member States into global markets through greater participation in regional and international value chains. The ACP TradeCom II programme would support this by producing (1) a cadre of trained and certified trade policy professionals and practitioners to operationalize the exclusive competence of the OECS Commission mandated by the RTB; (2) well-defined mechanism for private sector involvement in trade policy dialogue and decision making; (3) a single modernised and strengthened OECS trade policy coordinated by the OECS Commission and, led and implemented by the OECS Protocol Member States and (3) a harmonized Trade Information and Facilitation Platform (TIFP) to support trade policy analysis, negotiations and seizing opportunities and synergies for trade by the private sector.

Assignment

This assignment will focus on the development of an OECS Private Sector Trade Facilitation and Engagement Strategy that will strategically position the ECEU to enhance its global market integration.

Objective of the Assignment

Justification

The private sector provides critical goods and services that improve people's lives; generate domestic tax revenues; and are key to stimulating industrial development and economic growth. The export of goods and services generates foreign exchange (crucial for macroeconomic stability) and enables firms to expand their production frontiers, achieve economies of scale and enhance their competitiveness. More importantly, private sector investment and productivity tends to lead to innovation which can be a transformational force for the development of the region.

In spite of the recognition that international trade is a critical driver of economic growth, OECS Protocol Member States have played a very marginal role in international trade due to the persistence of both supply-side constraints as well as non-tariff barriers to trade and policymakers within the OECS region have historically emphasised the dire need for greater ease and facilitation of trade, to minimising transactional costs of bilateral and multilateral trade. The success and effectiveness of global trade liberalisation and integration is largely dependent on how it is facilitated to improve both regulatory procedures as well as facilitating the relationship between businesses and government agencies to reduce costs.

Further, institutional deficiencies have been a longstanding impediment that have stymied the effective formulation of trade policy and negotiating positions in OECS Member States. These include inadequacy of national coordinating mechanisms for providing input to the OECS Commission, lack of private-public partnerships and formal consultative mechanisms to facilitate implementation of trade facilitation reforms, as well as the need for improved flows of information and reliable mechanisms to encourage and sustain stakeholder participation throughout the process.

A well-defined Private Sector Trade Facilitation and Engagement Strategy that simultaneously focuses on:

- (i) targeted negotiating and competitiveness strategies (addressing transactional costs) that aim to reduce both border and behind the border (non-tariff barriers) bottlenecks to facilitate greater entry into global supply chains;
- (ii) Sector-based technical assistance and support to address unjustified or unnecessary bureaucratic issues linked to destination markets non-tariff barriers for sector specific goods and services, that hinder inter-regional trade, inter-continental trade and ultimately global connectivity;
- (iii) strengthening formal consultative and dialogue mechanisms for achieving greater involvement of the OECS Private Sector, through evidence-based decision and policy making that aligns with national, regional and sustainable development goals

The above will positively impact the attempts of OECS Protocol Member States and the OECS Commission at achieving deepened regional and global economic integration.

It is anticipated that by the end of the Project, the OECS will be in a position to significantly advance towards supporting the OECS Private Sector to tackle constraints to global competitiveness by engaging the OECS Private Sector via OECS Trade Policy Committee (OECS TPC) and the National Trade Policy Committees (NTPC) in each Protocol Member State, to systematically formulate and implement an appropriate and well-tailored OECS Private Sector Trade Facilitation Strategy that aims to amplify corrective policy and technical support measures to alleviate exogenous Non-tariff Barriers (NTBs) that continue to inhibit market penetration of niche sectoral products and services of OECS Private Sector Firms in inter-regional and inter-continental trade.

Objective

The main objective of this Consultancy is to develop an Integrated Regional OECS Private Sector Trade Facilitation and Engagement Strategy to broaden and deepen the holistic engagement of the private sector in advancing strategic solutions that lower trade transaction costs and improve the capacity of the OECS Private Sector to compete effectively.

It is anticipated that this Strategy will take into account existing diverse trade facilitation policy instruments as well as the views and aspirations of all the relevant actors in the region. In addition, this strategy will explore best practice models for an integrated mechanism of engagement to improve and diversify OECS export bases and, in the long run, consolidate economic gains from reducing transactional costs at the border and behind the border.

Geographical area to be covered

The islands of Antigua and Barbuda, Commonwealth of Dominica, Grenada, St. Kitts and Nevis, Saint Lucia and St. Vincent and the Grenadines.

Target groups

The target groups include, *inter alia*:

1. National and regional Chambers of Commerce
2. Ministries and Government agencies with responsibility for Trade-related issues and Trade Policy
3. National and regional Business Support Organisations (BSOs)
4. Private Sector Associations
5. Export Development Trade Promotion Agencies
6. Investment Agencies
7. OECS Business Council, OECS Trade Policy Committee and the National Trade Policy Committees
8. Relevant units/departments/experts at the OECS Commission

Scope of Work

To complete this assignment, the Consultant will undertake the following specific tasks:

1. Develop an appropriate methodology for carrying out the assignment. The detailed methodology should be included in the technical proposal as well as the Inception Report;
2. Carry out in-depth desk review of similar strategies within the region and globally to glean best-fit practices and models of national and regional collaboration for increased private sector engagement on trade facilitation and

policy and competitiveness strategies (aimed at reducing transactional costs and improving capacity to compete). The review of strategies should also take account of the operation and effectiveness of trade promotion and contact/enquiry points commitments under various Bilateral and multilateral Trade Agreements;

3. Conduct consultations with national and regional private sector stakeholder bodies, including the Chambers of Commerce, National Private Sector Associations, the OECS Business Council, etc. to obtain their views and aspirations regarding their expectations of the national, regional and international trade policies which govern and regulate their participation in the global marketplace;
4. Conduct consultations with national and regional trade policy makers such as the OECS Commission, CARICOM Secretariat, Caribbean Export Development Agency, National Trade and Export Promotion Agencies, National Trade Policy Committees, and other relevant decision-making bodies to garner their views on modern and appropriate competitiveness strategies to strengthen and deepen the integration of the ECEU into economically viable value chains and the wider global economy;
5. Formulate and propose trade facilitation solutions and a competitiveness model for the OECS, structured on long-term development goals of the Eastern Caribbean Economic Union, and best practices which are appropriate and relevant to the region; and also provide a clear road-map for how a tailored and customized Trade Facilitation Strategy and Private Sector Engagement Mechanism could boost competitiveness and solidify the leadership of the ECEU as export hubs;
6. Prepare a Six (6) year OECS Private Sector Trade Facilitation and Engagement Strategy that considers the re-defined strategies of the OECS Business Council (OBC) to be fully compliant with the necessary conditions and international best practices in order to leverage economic opportunities and participate in global trading in goods and services;
7. Develop a Sustainability Plan for an OECS Public Private Partnership (PPP) for the effective and continuous engagement of the Private Sector in trade-and competitiveness policy formulation, design and effective implementation of trade facilitation solutions, and long term strategies to address at-the-border

and behind-the-border challenges, to make trade easier, less costly and more efficient, taking into account the output at (6) above;

- 8.** Conduct a one-day Virtual Validation Workshop for the relevant Public and Private Sector stakeholder bodies to review and validate the Strategy;
- 9.** Present Final Private Sector Trade Facilitation and Engagement Strategy to the OECS Commission, OECS National Trade Committees and Regional Trade Policy Committee, Ministers of Trade and Economic Affairs Council.

Assumptions and Risks

1. There is strong political will and commitment to the OECS Economic Union and regional integration regime at the individual institution and regional levels;
2. Member States are resolute in their commitment to participate fully in the Economic Union;
3. The recommendations proposed are technically and financially feasible;
4. Availability of contractors (Consultants) with suitable expertise and experience;
5. Minimal delays due to weather/climatic conditions and in deliverables by the Contractor(s);
6. Effective mobilisation and coordination of necessary capacity and inputs from relevant national agencies;
7. Full support of the Governments for the implementation of the activities;
8. The OECS Commission will have the requisite capacity to successfully coordinate and implement the project;
9. Member States will remain committed and work collaboratively with the OECS Commission and the Consultant in delivering the outputs and
10. COVID-19 Protocols hinders the ability of the consultant to gather required data (for example limited face-to-face consultations, mandatory quarantine periods if travelling from outside of the receiving country's travel bubble, the availability of key stakeholders for virtual interviews, the capacity of stakeholders to use virtual conferencing technology and the availability the technology and supporting infrastructure).

Qualification and Experience Requirements

- Graduate studies in law, economics, public administration, political science, or other relevant field of studies;
- At least 10 years of experience, including in the Eastern Caribbean Economic Union area, providing advisory and consultancy services to public entities or private firms on trade reform (regional, multilateral, bilateral) or business regulations for CARICOM Services Industries. International experience would be considered an advantage;
- At least 10 years' experience on regional and international projects with development partners, regional agencies and international organizations as Team Leader;
- Experience in the successful completion of at least one similar assignment within the last five (5) years;
- Strong knowledge, familiarity and experience with CARICOM Bilateral Trade Agreement and other Multilateral Agreements;
- Extensive experience in designing Public Private Partnership Engagement Mechanisms and international trade competitiveness strategies would be an advantage;
- Familiarity with the legislative and regulatory environment for business operations in the Protocol Member States of the OECS Economic Union or other CARICOM economies would be a strong advantage
- Previous experience in trade policy negotiations or work of a similar nature on behalf of OECS Protocol Member States would be an advantage;
- Fluency in English; knowledge of the business culture of OECS Protocol Member States would be an asset;
- Exceptional interpersonal skills and results oriented;
- Have experience in managing teams in a cross-cultural environment;

Logistics and timelines

Location

The Consultant will be located at its usual place of business. However, the Consultant will be required to maintain contact with the OECS and conduct research in the six (6) OECS Protocol Member States to complete the assignment.

Duration

This exercise shall commence from the date of contract for a maximum period of six (6) months, consecutive.

Reporting Requirements

The Consultant will submit the following reports in English in one original copy and one electronic copy.

- **Inception Report** of maximum 12 pages to be produced after five weeks from the start of implementation. In the report the contractor shall describe e.g. initial findings, progress in collecting data, any difficulties encountered or expected in addition to the work programme and staff travel.

The Consultant will also submit the general outputs detailed in the Terms of Reference. The Consultant should proceed with his/her work unless the contracting authority sends comments on the inception report.

- **Interim report**, a maximum of 2 interim reports will be required detailing progress, challenges, steps ahead and any unforeseen development or other circumstances relevant to the implementation of the project, to take account of COVID-19 Safety and Health Protocols instituted by Member States.
- **Draft report** of maximum 250 pages (main text, excluding annexes) submitted no later than one month before the end of the period of implementation of tasks. The report shall contain a sufficiently detailed description of the different options and analyses underpinning the recommendations to support an informed decision on the outputs.
- **Final report** with the same specifications as the draft final report, incorporating any comments received from the parties on the draft report arising from the Virtual Validation Meeting. The deadline for sending the final report is seven (7) days after receipt of comments on the draft final report. The report shall contain a sufficiently detailed description of the different options to support an informed decision on the development of public and private sector partnerships to facilitate the Six (6) year OECS Private Sector Trade Facilitation and Engagement Strategy and Sustainability Plan for engagement of the Private Sector on in trade-related and competitiveness policy formulation, and trade facilitation solutions.

The detailed analyses underpinning the recommendations will be presented in annexes to the main report.

Indicative Payment Schedule

Deliverable	Payment
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Output 1: Inception meeting report, including work plan and schedule	20%
Output 3: Draft Report	45%
Output 5: Final Report	35%

GUIDELINES FOR SUBMISSION OF EXPRESSIONS OF INTEREST

Individual Consultants are invited to indicate their interest in providing the services. Interested Consultants must provide information on their capability and suitability to undertake the assignment.

Consultants interested in undertaking the prescribed Services are to email an Expression of Interest to include:

1. Information on the Consultant's qualifications to perform the services, experience and competence relevant to the assignment, including a Curriculum Vitae.
2. A concept note on the planned framework for undertaking the assignment and a breakdown of the number of days required for each task as per the Scope of Services in the TOR.

Expressions of Interest submitted should not exceed 20 pages.

The Consultant shall bear all costs associated with the preparation and submission of his/her Expression of Interest.

The OECS is not bound to accept any Expression of Interest, and reserves the right to annul the selection process at any time prior to contract award, without thereby incurring any liability to the Consultants.

For more information or to submit Expressions of Interest, please contact:

Jenna Flavien
Procurement Officer
OECS Commission Morne Fortuné
P.O. Box 1383
Castries
Saint Lucia
Telephone:
Email: procurementbids@oecls.int
Copied to: kyle.garnes@oecls.int

An Individual Consultant will be selected in accordance with the Consultant's Qualifications (CQS-IC) Selection Method as detailed in the procedures set out in the Procurement Manual of the OECS, dated November 2013 revised June 2017.

The criteria to evaluate the Expressions of Interest received in relation to this assignment will include:

- Technical competence in undertaking the assignment;
- Academic qualifications;
- Experience in undertaking similar assignments; and
- Planned framework submitted for undertaking the assignment.

The Expressions of Interest will be evaluated and the Individual Consultant with the most relevant experience, qualifications and technical competence will be selected and requested to submit a fee proposal, which will be the basis for negotiations leading to a contract.

It is expected that the services will be conducted for a period of six (6) months, in keeping with the terms outlined in the Reporting Requirements above.

An electronic copy of the Expressions of Interest should be submitted by **October 8, 2021**, addressed to:

Ms. Jenna Flavien, Procurement Officer

At the following email address:

procurementbids@oecls.int

copied to kyle.garnes@oecls.int

The email submissions should include the name and address of the Individual Consultant and shall be clearly marked in the subject line as "Expression of Interest – ***Consultancy Services to Develop a Regional OECS Private Sector Trade Facilitation and Engagement Strategy to Facilitate Deeper Integration of OECS Protocol Member States into Global Markets***"