



11th EDF - EPA Programme - TBT Component

“Support to CARIFORUM States in Furthering the Implementation of their Economic Partnership Agreement Commitments and in Meaningfully Reaping the Benefits of the Agreement”

## **TERMS OF REFERENCE (TOR)**

### **CARICOM REGIONAL ORGANIZATION FOR STANDARDS AND QUALITY**

#### **CONSULTANCY TO UPDATE THE FIVE-YEAR**

#### **REGIONAL STANDARDS DEVELOPMENT PRIORITY PLAN (RSDPP)**

### **1.0 BACKGROUND**

The CARICOM Regional Organisation for Standards and Quality (CROSQ) was created as an Inter-Governmental Organisation by the signing of an agreement between the fifteen Member States of the Caribbean Community (CARICOM). CROSQ was formally launched at its first General Assembly in St. Vincent in April 2002. The organisation's headquarters was established in Barbados in April 2003. The 15 National Bureau of Standards (NSBs) of CARICOM Member States are CROSQ's principle shareholder group and beneficiary base of its services.

CROSQ is the regional centre for promoting efficiency and competitive production in goods and services, through the process of standardization and the verification of quality. CROSQ supports the CARICOM mandate in the expansion of intra-regional and extra-regional trade in goods and services as set out in Article 67 of the Revised Treaty of Chaguaramas (2001) and is directly mandated to represent the interests of the region in international quality infrastructure work, to promote the harmonization of standard and metrology systems and the mutual recognition of conformity assessment schemes, and to increase the pace of development and implementation of quality competitiveness actions for the sustainable production of goods and services in the CARICOM Single Market and Economy (CSME), and the enhancement of social and economic development.

#### **Organisation Objectives**

The key objectives as outlined in the Intergovernmental Agreement establishing CROSQ are to:

1. Promote the development and harmonization of standards, metrology, technical regulations and the mutual recognition of conformity assessment procedures covering goods and services produced and provided in the Region with the aim of facilitating trade and supporting the establishment of the CARICOM Single Market and Economy (CSME);
2. Encourage the mutual recognition of accreditation and certification systems which are based on internationally accepted criteria;





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3. Facilitate the achievement of international competitiveness of regional goods and services by fostering a culture of quality in regional enterprises;
4. Support standards infrastructure development at the national level;
5. Promote consumer welfare and safety;
6. Through its operations, contribute to the preservation of the environment and conservation of natural resources of the Region;
7. Provide guidance to regional organizations and bodies regarding matters within its competence, including dispute settlement;
8. Promote and protect the interests of State Parties and Associate Members in the regional and international standardization for a, including external negotiations; and
9. Promote awareness of standards and standards-related matters in governments, and industry and commerce.

Since 2002, CROSQ has developed its structures and competencies in relation to staffing at the CROSQ Secretariat toward an efficient and effective network. However, based on the growing demands to facilitate international trade and the increasing importance of high-level standards and technical regulations in developed markets, there is need for the CROSQ Secretariat, National Standards Bodies (NSBs), private sector and consumers to collaborate and enhance national and regional competitiveness and socio-economic development.

The issue of synchronising regional and national standardization strategies is highly important in setting the framework for the efficient and effective development and adoption and of regional standards by member states and realising harmonised conformity assessment regimes. Standardisation is generally a very costly activity and financially challenged National Standards Bureaux (NSBs) needs to be strategic in the use of the limited resources that they have for such activities, especially since regional standards development is actually executed at the national level by the NSBs.

With these things in mind, the CROSQ Secretariat developed a consensus driven Five-year Regional Standards Development Plan (RSDPP) as approved by CROSQ Council in 2017 and the Secretariat is now desirous of updating same, based on CARICOM's and individual Member State future economic and social priorities.





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### 2.0 SPECIFIC PURPOSE

The purpose of this consultancy is to update the RSDPP so as to guide the direction of the regional work over the next five years, beginning 2022, and so manage the expectations of member states and provide a basis for efficient and effective resource utilization and also, mobilization.

### 3.0 OBJECTIVE

The objective of the consultancy is to update the existing five - year Regional Standards Development Priority Plan for another five-year period, 2022 to 2027, based on balancing the standard development and implementation needs and priorities of member states with regional interests.

### 4.0 SCOPE OF WORK

In order to carry out this consultancy, it will be necessary for the consultant to display a basic understanding of quality infrastructure development, standardisation and strategic planning. The consultancy will be given oversight by the Technical Officer – Standards Development at the CROSQ Secretariat.

#### 4.1 Specific Activities

Specifically, the Consultant should:

##### 4.1.1 Host an Inception Meeting

An initial meeting (medium to be decided by the parties involved) is to be held with representatives of the Technical Management Committee (TMC), the regional standards development committee of CROSQ, and the CROSQ Technical Officer – Standards. This CROSQ team will clarify the responsibilities of the consultant and the level of support which will be provided in the execution of the exercise. **A workplan and schedule of the deliverables** is to be included in an **Inception Report** and submitted within one week thereafter by the Consultant for approval.

##### 4.1.2 Conduct Secondary and Primary Review Research

Circulate the 2017 RSDPP to all TMC Members with a Comments Sheet to capture issues and ideas that need amending for the 2022 – 2027 period.

Supplemental interviews with at least the Heads of Standardisation Departments in Member States are expected to be arranged to compliment this exercise.





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This review is to be completed within four weeks of the start of the assignment and a **Review Research Report** submitted to the CROSQ Secretariat for approval.

Such **Review Research Report** to contain, inter alia, a classified finding from the field in terms of the state of appropriateness of the RSDPP for the next five years, issues that would need attending too in order to make the RSDPP practical for the next five years, and resolution ideas – technical areas and structure of the document (as necessary) etc.

#### 4.1.3 Facilitate Strategic Planning Workshop - Online

A **Workshop** is to be held on the **Review Research Report** with standardization experts from each of the 15 CARICOM NSBs to discuss and agree upon the specific contents and structure of an updated five-year Draft Regional Standards Development Plan 2022 - 2027.

This **Workshop** is to be conducted and **Post - Workshop Report** submitted to the CROSQ Secretariat for approval within four weeks of the **Review Research Report** itself, having obtained approval from the CROSQ Secretariat.

#### 4.1.4 Updated Draft Five Year Regional Standards Development Plan: 2022 – 2027

Prepare an updated **Draft Five - year Regional Standards Development Plan 2022 – 2027 inclusive of an Implementation, Monitoring and Evaluation Framework** based on outputs from the **Workshop** and present to TMC for feedback within two weeks after approval of the **Post - Workshop Report**.

#### 4.1.5 Final Draft Five Year Regional Standards Development Plan: 2022 – 2027

Amend the Draft plan as necessary based on disposition of comments and present the **Final Draft Five Year Regional Standards Development Plan: 2022 – 2027 inclusive of the finalised Implementation, Monitoring & Evaluation Framework** to the TMC and CROSQ Council at its respective Meetings for approval, latest being October 2022.

#### 4.1.6 Project Completion Report & Five-Year Regional Standards Development Plan: 2022 - 2027

Thereafter, the consultant will submit the completed Plan for Council's confirmed approval and a Project Closeout Report detailing the development process, lessons learnt and recommendations arising.



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All activities are expected to be conducted in an online environment. Timelines are indicative and are expected to be firmed up by the time of the Inception Report.

### 5.0 CONSULTANT REQUIREMENTS

This consultancy requires the services of one key expert and is open to nationals of CARICOM Member States. The appointed consultant must meet the following minimum requirements:

#### *Qualifications and Skills*

- A postgraduate degree in any of the following: trade policy, engineering, natural sciences or related fields
- Training in national, regional and international standardisation matters.
- Proficiency in the use of information technology tools.

#### *Caribbean related Professional Experience*

The appointed consultant must be able to demonstrate:

- At least five (5) years professional experience in working in standardisation
- Recognised competence and expertise in ISO methodology of setting priorities for standardisation.
- Familiarity with the regional standards development process and experience working with CARICOM National Standards Bodies. .
- Experience in strategic planning

### 6.0 OUTPUTS/DELIVERABLES

The consultant is required to deliver the following for approval:

1. Proposed workplan and schedule of deliverables
2. Review Research Report
3. Workshop and Post - Workshop Report
4. Draft Five-year Regional Standards Development Plan: 2022 – 2027 inclusive of an Implementation, Monitoring and Evaluation Framework
5. Final Draft Five-year Regional Standards Development Plan: 2022 – 2027 inclusive of the finalised Implementation, Monitoring and Evaluation Framework
6. Project Completion Report and completed Five-year Regional Standards Development Plan



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## 7.0 DURATION

The consultancy is expected to be completed within six (6) months.

## 8.0 SUBMISSION OF PROPOSALS

The proposal is required in English. The deadline for submission of Proposals is no later than **1:00 pm on December 3, 2021** and sent by email to Mr. Terry Hutchinson at [terry.hutchinson@crossq.org](mailto:terry.hutchinson@crossq.org) and copied to Ms. Patrine Hinds at [patrine.hinds@crossq.org](mailto:patrine.hinds@crossq.org). Any proposal received after this deadline will not be considered. CROSQ reserves the right to negotiated rates with the most technically eligible respondent.

## 9.0 EVALUATION OF TECHNICAL PROPOSALS

Selection of consultant will be based on experience and competence. The quality of each proposal will be evaluated in accordance with the award criteria and the associated weighting as detailed below:

EVALUATION CRITERIA	WEIGHTING (%)
<b>1. Qualifications</b> <ul style="list-style-type: none"> <li>• A graduate and postgraduate degree in any of the following: trade policy, engineering, natural sciences or related field</li> <li>• Training in international, regional and national standardisation issues</li> <li>• Proficiency in the use of information technology tools</li> </ul>	10   5  5
<b>2. Caribbean related Professional Experience</b> <ul style="list-style-type: none"> <li>• At least five (5) professional experience in working in standardisation</li> <li>• Recognised competence and expertise in ISO methodology of setting priorities for standardisation.</li> <li>• Familiarity with the regional standards development process and experience working with CARICOM National Standards Bodies.</li> <li>• Experience in strategic planning.</li> </ul>	15  15  15  15
<b>3. Quality of Technical Proposal</b> <ul style="list-style-type: none"> <li>• Organization and methodology               <ul style="list-style-type: none"> <li>- consultants understanding of assignment</li> <li>- adequacy/appropriateness of proposed methodology and strategy</li> </ul> </li> </ul>	10



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EVALUATION CRITERIA	WEIGHTING (%)
<ul style="list-style-type: none"><li>• Work Plan<ul style="list-style-type: none"><li>- Reasonableness of completion time estimates and work breakdown structure</li></ul></li></ul>	10

All proposals will be reviewed and scored using the above-mentioned criteria. Proposals obtaining a minimum technical score of 75 will be short-listed for further consideration.

## 10.0 FINANCIAL PROPOSAL

In preparing the Financial Proposal, consultants are expected to list all costs associated with the assignment including professional fees, direct costs and reimbursable costs. Consultants are required to express the price of their services in Euros or United States dollars. Fees are not subject to taxes.

**The Financial Proposal should be submitted separately from the Technical Proposal.** The Financial Proposal is weighted at 20% of the overall score.

## 11.0 ADDITIONAL INFORMATION

For further information, please contact Mr. Terry Hutchinson at [terry.hutchinson@crosg.org](mailto:terry.hutchinson@crosg.org) and copied to Mr. Deryck Omar at [deryck.omar@crosg.org](mailto:deryck.omar@crosg.org).

## 12.0 COPYRIGHT AND INTELLECTUAL PROPERTY RIGHTS

All information pertaining to this consultancy (documents etc.) belong to and remain the property of CROSG as the sole owner of all content and material, and exclusive rights over its use developed under this TOR. Thus, must be availed to upon completion and/or request at any time.