



## 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”

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

### **CARICOM REGIONAL ORGANIZATION FOR STANDARDS AND QUALITY CONSULTANCY SERVICES TO SENSITIZE AND PROVIDE GUIDANCE TO PRIVATE SECTOR BUSINESSES IN MONTSERRAT ON THE AREAS OF INTERNATIONALLY RECOGNIZED STANDARDS AND CERTIFICATION PRINCIPLES AND PRACTICES**

#### **BACKGROUND**

Over the years, Montserrat has endured significant setbacks due to natural disasters which have impeded developmental efforts for key economic sectors. This has not only affected the economic progress of the country, but has resulted in a severe dislocation of its population. In the most recent national census, Montserrat's population stood at 4,519- a population deficit of approximately 7,000 when compared to the pre-volcanic era of 12,000.

Given the current state of affairs, almost 50% of the island's economic output is derived from public services, with inputs from construction, mining, tourism, agriculture and the financial sectors. The business landscape is a very diverse one with wholesale and retail businesses being very popular, and service-based businesses being on the upward climb.

In the past, Montserrat had a growing manufacturing industry, but presently, the cottage industry has become more prevalent. More so, because of setbacks related to the island's population and limitations surrounding capital requirements. Given that the production is more labour intensive, the net output is usually very small and does not equate to sufficient and consistent quantities for export. Notwithstanding, these industries, which usually comprise of agro-processors and light manufacturers (non-food items) provide an additional source of income for owners, and allow for the culinary and creative culture of Montserrat to be displayed in storefronts. These industries also pair well with local tourism efforts and can provide a strong comparative advantage for entrepreneurs if they are aware of the value of their Product, their Packaging, Pricing, Place of distribution and of course, the importance of the Personalization factor.

#### **QUALITY INFRASTRUCTURE ON MONTSERRAT**

Over the years, the Government of Montserrat (GoM) has made several strides to develop a robust QI. This of course, has not been without its fair share of challenges. Most recently, extensive work has been done on updating draft QI legislation, i.e., Standards Bill and Metrology Bill. These critical pieces of legislation are intended to outline the framework of Montserrat's QI and propel the development of a quality culture. Furthermore, work is currently being undertaken to source funds for the development of a National Quality Policy (NQP) to support the country's QI development thrust.

As one of the smallest islands within the Caribbean Community (CARICOM), Montserrat is at a less advanced stage in the development of Quality Infrastructure (QI). However, more and more, it is becoming important for quality to form part of the island's national development priorities. The Government's Policy Agenda 1.10 is clear in its stance- “Enhanced market competitiveness, through the implementation of a robust quality infrastructure, which underpins the development of standards across industries. Furthermore, the desire for a more defined QI is posited in Policy Agenda 1.4 – “Develop strategies for addressing obstacles to doing business and implement sequenced plans for the removal and mitigation of these obstacles”.



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---

### QI ACTIVITIES ON MONTSERRAT

#### METROLOGY SERVICES

In 2020, the Trade and Quality Infrastructure relaunched its annual Metrology Programme after a 10-year hiatus. This reinstatement now provides for regular quality assurance specific to areas of mass and capacity. Additionally, the Division has realized that since the relaunch, much interest has been observed from persons within the private and public sectors who are desirous of the service.

#### ABATTOIR OPERATION

The Ministry of Agriculture currently manages a state of the art abattoir, averaging at 4,100 square feet and was designed to international standards to meet the requirements for export. Since then, the Ministry has facilitated a number of training opportunities, both for staff and interested stakeholders within the private sector on how to prepare animals for slaughter and techniques in meat handling, cutting, deboning and packaging. The facility allows for manufacturing products such as hamburger patties, sausages and hams. It allows for slaughtering of sheep, goat cattle and pigs.

#### OTHER TESTS

The Environmental Health Department alongside the Montserrat Utilities Limited usually conduct the following inspections and testing:

##### Food related testing

The Environmental Health Department carries out regular inspections of supermarkets, food establishments and the abattoir for sanitary and hygienic purposes. The Department does not have a testing lab, and so scientific tests pertaining to food are not carried out.

##### Water testing (potable and bottled)

The tests below are generally conducted by the Montserrat Utilities Limited at source but are also available to the public:

- Chlorine residual testing
- Bacteriological testing
- Turbidity levels
- Total Coliform Testing
- Fecal Coliform
- Enterococci
- Temperature and PH
- Calcium and Magnesium
- Nitrate and phosphate specific for waste water- also done at source
- Hardness
- Chlorine residual testing

Given the size of the island, the QI function sits within the Trade Division, however, the technical expertise is dispersed throughout the different GoM entities, but a more coordinated effort would need to be taken as legislative thrusts become more forthcoming.

The desire is evident, the overarching legislations and policies are being developed, but there is need for the key implementers and facilitators to be thrust into the QI field to allow for the impact to be prominent in Montserrat.



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A LOOK AT THE AGRO-PROCESSING SECTOR

Although the island is heavily serviced based, the agricultural industry continues to generate much needed support given the Government’s thrust in promoting food security. In October 2016, the Caribbean Centre for Development Administration (CARICAD) partnered with the Government of Montserrat (GoM) to develop an Agricultural Strategy and Marketing Plan. This document presents a framework for a policy of food import substitution in Montserrat with a commitment to the exploration and development of niche market opportunities for selected commodities.

Agro-Processing was a key pillar of focus in this strategy and a SWOC analysis highlighted the following:

<b>SWOC ANALYSIS 4 : AGRO-PROCESSING</b>			
<b>STRENGTHS</b>	<b>WEAKNESSES</b>	<b>OPPORTUNITIES</b>	<b>CHALLENGES</b>
Tradition of agro - processing with potential for a wide range of products to be produced	Absence of specialist skills in the Department of Agriculture	To support existing cottage craft efforts in processing	No dedicated allocation for processing
High level of acceptance of locally processed food products	No dedicated work unit in the Department of Agriculture	Utilise the skills of experienced persons for skill transfer	Limited infrastructure and no major high volume processing facility

During the strategic development process, the main stakeholders highlighted the following issues and support requirements:

- Easy access to affordable packaging
- Support for processing-facilities and equipment
- Technical support
- Support for promotion and marketing
- Training in specific products and techniques
- Oversight and regulation of hygiene practices

Goal 4.2 of this policy document was very specific to the quality aspect of agro-processing in an attempt to increase export potential. Since the development of this strategy, the Department of Agriculture has prioritized the need for trained personnel in this area. As a result, The Department now has a qualified Agro-Technologist and Quality Officer whose primary job function is to assist agro processors in their development efforts.

This however, is not without setbacks, as there are still challenges related to acquiring suitable equipment and an appropriate facility to conduct requisite testing. One can arguably contest that demand would be a driving force for this level of development, but, with the current slate of agro-processors, the quantity and sophistication of equipment required is not likely to be exorbitant. The Agriculture Department sees the need for a small scale facility to support developmental thrusts of its agro-processors and to build on the quality assurance aspects, inclusive of health and safety requirements.

Within the agro-processing industry, common commodities produced are: oils, condiments, fruit spreads, honey, wines, cassava bread, fudges, local juices, sugar cakes, ginger sticks, tamarind balls, pepper sauce, meat and fish. Notwithstanding, most of the products are not offered consistently on the market due to seasonality of crops and other individual challenges faced by the producers.

Ordinarily, however, these bi-products are found in supermarkets on a small scale, and are typically not readily available for purchase from producers. Most notably, these products are more highly demanded around the peak times of the island’s cultural celebrations in March, July, and December. In these instances, there should be greater



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---

focus on packaging and labelling requirements to emphasize and promote the Montserrat brand. The Government of Montserrat in 2021 launched a trade show dubbed, Produced in Montserrat Expo- PRIME. This expo has exposed a number of food and non-food manufacturers to the local market and has cemented the need for a local quality-focused programme.

Even as the GoM commits its resources to building the sector, there are drawbacks surrounding transportation linkages throughout the region if agro-processors were to eventually expand their boundaries. This is a common issue facing smaller islands within CARICOM. The cost factor involved with exporting, must also be considered as a major challenge.

## OBSERVATION FROM THE TRADE AND QUALITY INFRASTRUCTURE DIVISION

Amongst the challenges listed above, the packaging and labelling requirements for various food and non-food related products is another area of weakness. The deficiencies within the legal environment, which would ordinarily outline basic requirements for labels is not present. Although the Trade Division provides consults with light manufacturers on basic labelling, there is a need for widespread knowledge on this topic.

## SCOPE OF WORKS

The general objective of this activity is to assist private sector companies with a foundational understanding of the role of internationally recognized certification to relevant standard(s) procedures and protocols.; and to encourage conformity to appropriate standards thereby improving the quality and competitiveness of products and services and boosting consumer confidence.

More specifically, the key objectives of the Consultancy are as follows:

1. Explain the main tenets of Quality and a National Quality Infrastructure and the benefits to national development, firm level competitiveness and consumer satisfaction and protection with a special focus on the importance of labelling and packaging as key requirements for standards and quality.
2. Emphasize the importance, drivers and benefits of Quality and Agriculture/Food Management Systems (QMS), and internationally recognized Certification to such Standards, especially public and private QMS Standards that might be relevant to the target audience.
3. Better understand the roles of the private sector, national quality infrastructure institutions such as the National Standards Body, National Certification Body and other such Quality Infrastructure organizations involved in improving national and firm level competitiveness; including firms understanding the various processes which are required for a business to be in alignment with Standards.
4. Provide stepwise guidance on how a firm can achieve accredited certification to relevant QMS Standards.

In the execution of the Consultant’s duties, the Consultant will be expected to undertake at least the following activities:

- Develop a beginner friendly **Guide Book** which participants would utilise throughout the programme, complete with all material, curriculum, guidance notes, activities and resource information. This should also be made available in soft copy format and aimed at a basic understanding of all the components of quality infrastructure.



## 11th EDF - EPA Programme - TBT Component

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---

- Facilitate a number of **Training Sessions** on the Guide Book with emphasis on nonfood and food QMS and certification thereof, geared towards two primary stakeholder groupings: light manufacturers of food & non-food products and service providers.
- Develop a simple and realistic **Roadmap/s** that will provide guidance to stakeholders on the procedures and protocols to become aligned to relevant QMS standards and the journey towards accredited certification.
- In respect of the **Training Sessions and Roadmaps** aforesaid, conduct two sessions targeting each stakeholder grouping. Each should run over a two-day period for two to three hours each day. On day five, all stakeholders (av. 30) should gather for the Consultant to share the Roadmap/s. These face-to-face sessions conducted over one work week, should take place in the afternoons/evenings/night in Montserrat to accommodate entrepreneurs.
- During the day-time the Trade Division will also organise for the Consultant to make **on-site visits** to businesses for some one-on-one general advisory services.

### DELIVERABLES

The consultant is required to deliver the following for approval:

1. Host an Inception Meeting and eventually produce an Inception Report detailing the engagement after consultation and harmonization with the Trade Division
2. Training Materials and Training Plan, inclusive of a digital copy of a beginner friendly Guide Book which participants would utilize throughout the Programme, complete with all material, guidance notes, activities and resource information.
3. A Training Report, inclusive of evaluation templates and completed evaluation forms per participant / firms on the delivery of the training.
4. Roadmap/s that will provide guidance to stakeholders on the procedures and protocols to become aligned to relevant QMS standards and the journey towards accredited certification.
5. Close out Report with lessons learnt, recommendations etc.

### DURATION

The consultancy is expected to be completed within 20 expert-days over a two (2) month period.

### KNOWLEDGE, SKILL AND EXPERIENCE OF THE CONSULTANT

The Consultant should possess:

- Master’s degree in Natural Sciences, Applied Sciences, Engineering, Economics, International Trade, Law, Business Studies, and/or directly related discipline.
- At least 10 years of professional experience in quality infrastructure development inclusive of specific experience in internationally recognized standardization and conformity assessment principles and practices in support of trade and private sector development in developing countries;
- Knowledge and experience of the CARICOM system and its organs and bodies.
- Experience with CARICOM quality infrastructure institutions, CARICOM trade and private sector firms.
- Good Communication skills in English, both orally and in writing, interpersonal skills and the ability to work well with others in a collaborative environment.



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## INVITATION TO TENDER ON THE TOR

The Consultant will be hired under a contract and supervised by the CROSQ Secretariat, in consult with the Trade and Quality Infrastructure Division in Montserrat for the purpose of delivering on the Scope of Works, within the agreed time frame.

The CROSQ Secretariat and the Trade and Quality Infrastructure Division in Montserrat shall provide necessary support to the CROSQ Consultant in order to execute the assignment during the duration of the consultancy.

A Financial Proposal should be submitted separately from the Technical Proposal; but at the same time.

The deadline for submission of Proposals is no later than **1:00 pm Atlantic Standard Time (AST) on September 23, 2022** and sent by email to Mr. Terry Hutchinson at [terry.hutchinson@crosg.org](mailto:terry.hutchinson@crosg.org) and copied to Ms. Patrine Hinds at [patrine.hinds@crosg.org](mailto:patrine.hinds@crosg.org). Any proposal received after this deadline will not be considered.

## EVALUATION OF PROPOSALS

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

EVALUATION CRITERIA	Scores (%)
<b>1. Qualifications</b> <ul style="list-style-type: none"> <li>Master’s degree in Natural Sciences, Applied Sciences, Engineering, Economics, International Trade, Law, Business Studies, and/or directly related discipline.</li> </ul>	10
<b>2. Caribbean related Professional Experience</b> <ul style="list-style-type: none"> <li>At least 10 years of professional experience in quality infrastructure development inclusive of specific experience in internationally recognized standardization and conformity assessment principles and practices in support of trade and private sector development in developing countries;</li> <li>Knowledge and experience of the CARICOM system and its organs and bodies.</li> <li>Experience with CARICOM quality infrastructure institutions, CARICOM trade and private sector firms.</li> <li>Good Communication skills in English, both orally and in writing, interpersonal skills and the ability to work well with others in a collaborative environment.</li> </ul>	10 10 10 10
<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> <li>Work Plan               <ul style="list-style-type: none"> <li>Reasonableness of completion time estimates and work breakdown structure</li> </ul> </li> </ul>	25 25

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.



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## FINANCIAL PROPOSAL

In preparing the Financial Proposal, consultants are expected to list all costs associated with the assignment including professional fees and any reimbursable costs. Consultants are required to express the price of their services in United States dollars. Fees are not to include taxes, which is for the Consultant’s account. All travel, accommodation and per diem will be paid for directly by the project.

The Financial Proposal is weighted at 20% and the Technical Proposal 80%.

CROSQ reserves the right to negotiate methodology and rates with the most eligible weighted-scored respondent; and thereafter in order of sequential merit, should the preceding one prove not successful.

## ADDITIONAL INFORMATION

For further information, please contact Mr. Terry Hutchinson at [terry.hutchinson@crosg.org](mailto:terry.hutchinson@crosg.org) and copied to Ms. Patrine Hinds at [patrine.hinds@crosg.org](mailto:patrine.hinds@crosg.org).

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