

Request for Proposals
Knowledge Sharing on Trade and Development Issues
(the Philippines)

1.0 Introduction to CTIF

The Canadian Trade and Investment Facility for Development is a seven-year, CAD 11.6 million demand-driven program aligned with Canada’s Feminist International Assistance Policy (FIAP) to support sustainable trade and investment-related policy reforms and economic development initiatives that promote women’s empowerment and inclusive growth and have a high potential to reduce poverty in ODA-eligible developing countries in the Asia-Pacific region. CTIF provides technical assistance based on the needs identified by potential beneficiaries and according to an assessment process jointly administered by the CTIF team and Global Affairs Canada (GAC). Technical assistance is provided by independent suppliers that specialize in the specific services being requested by the beneficiary. Cowater International (www.cowater.com) and the Institute of Public Administration of Canada (www.ipac.ca) jointly implement CTIF on behalf of the Government of Canada.

2.0 Assignment Overview

Consultancy title:	Knowledge Sharing on Trade and Development Issues
Beneficiary Organizations:	Bureau of International Trade Relations, Department of Trade and Industry, Philippines
Anticipated duration:	11 months
Anticipated start date:	February 2024
Location of assignment	Consultant's Home Office (remote); Manila, Philippines, for the capacity building sessions.
Summary of assignment	This CTIF mandate aims to build Philippine officials' capacity, particularly in DTI, to craft and develop more sustainable and emerging trade-related issues/provisions in FTAs. In parallel, this mandate aims to further integrate Philippine firms, particularly women-led MSMEs, into the global supply chain through greater awareness, increased trade, and a more predictable regulatory environment within the Philippines while in parallel meeting the Government's SDGs and other development commitments.
Terms of Reference	See Annex 1
Maximum budget, excluding HST	CAD 200,000

3.0 Corporate Qualifications

Interested bidders must possess the corporate capabilities and experience described in Annex 1 (TORs), which can be evidenced through project profiles included in technical proposals using the form provided in Annex 2. Contracts for projects profiled by bidders must have been active within the last five calendar years, dating from the date of the release of this tender document.

4.0 Proposal Validity

A proposal must remain valid and open for acceptance for 90 days after the closing date of the RFP.

5.0 Team Member Qualifications

Bidders must provide CVs for the team members it proposes to undertake the assignment on behalf of CTIF and the beneficiary using the format provided in Annex 3.

6.0 Conflict of Interest – Unfair Advantage

In order to protect the integrity of the procurement process, the Bidders are advised that CTIF may reject a bid in the following circumstances:

- a. if the Bidder, any of its proposed Personnel, including any of their respective employees or former employees, was involved in any manner in the preparation of the bid solicitation;
- b. if the Bidder, any of its proposed Personnel, including any of their respective employees or former employees, was involved in any other situation of conflict of interest or appearance of a conflict of interest;
- c. if the Bidder, any of its proposed Personnel, including any of their respective employees or former employees, had access to information related to the bid solicitation that was not available to other Bidders and that would, in CTIF's opinion, give or appear to give the Bidder an unfair advantage; or,
- d. If the Bidder, its employees, or any of its proposed Personnel are related to an owner or employee of the Beneficiary or are currently working with the Beneficiary in a volunteer or paid capacity as an employee, consultant or director (board member).

7.0 Rights of Cowater International/IPAC:

As CTIF's lead executing agency, Cowater/IPAC reserve the right to:

- a) reject any or all Proposals received in response to the RFP;
- b) enter into negotiations with Bidders on any or all aspects of their Proposals;
- c) cancel the RFP at any time;
- d) reissue the RFP;
- e) if no compliant Proposals are received, and the requirement is not substantially modified, reissue the RFP by inviting only the Bidders who responded to resubmit Proposals within a period designated by Cowater; and
- f) negotiate with the sole compliant Bidder to ensure the best value to DFATD.

8.0 Coordination and Reporting

The Service Provider will be contracted by Cowater International and report to the CTIF Project Manager. More details on reporting requirements are provided in the attached TORs.

9.0 Proposal Structure and Evaluation Methodology

Technical Proposal Structure (mandatory requirements)

The structure, format, and content of technical proposals **must** align with the structure, page limits, and content provided below. With the sole exception of team members' CVs, any content exceeding required page limits in the main proposal or annex form will not be evaluated, and these sections will be considered non-compliant.

Table 1: Proposal structure and scoring methods

Content	Details	Weighting	Max Score	Page Limit ¹
Experience	Experience managing or implementing assignments of a similar nature in a similar geographic context.	12	72	10 pp. ²
Proposed approach and methodology	Proposed approach and methodology for delivering the assignment's intended results, including a detailed workplan and work schedule and performance framework integrating the assignment's intended results and CTIF's intended outcomes.	12	72	8 pp.
Project management and oversight	Proposed approach to project management, quality assurance, monitoring and reporting, including relevant roles and responsibilities of core team members.	4	24	2 pp.
Proposed team	Team member profiles, roles and responsibilities, level of effort per position, and org chart.	12	72	5 pp.
	Annexed CVs of proposed team members			2 pp per CV ³
Technical criteria	Total score:	-	240	-

Evaluation Methodology

Proposals will be evaluated using the cumulative analysis method. The proposal with the highest cumulative scoring will be awarded the contract. Applications will be evaluated technically and financially, and points will be attributed to technical proposals based on the assessment criteria detailed above. Scores of 0 – 6 shall be awarded based on the interpretations in Table 2 below.

Table 2: Score Attribution Criteria

Score	Criteria
6	Demonstrates expert understanding of the TORs and proposes innovative and appropriate solutions that address all requirements. Responses are well-tailored to the Client's requirements in all aspects. The level of detail and quality of information provide a high degree of confidence in the certainty of delivery.
5	Demonstrates a strong understanding of the issues in the TORs. Responses are tailored in most aspects and include some innovation. The detail and quality of the information provided give strong confidence that the requirement will be delivered to a high standard.
4	Demonstrates a good understanding of all issues relating to the delivery of TORs. Responses are tailored to the Client's requirements in some respects and demonstrate that proposals are robust. Provides sufficient detail and quality of information to give a good level of confidence that they will deliver.

¹ Use Arial 10, Normal margins.

² Bidders shall utilize the project profile template provided in Annex 2 of this RFT to complete this section. All project profile data must be included in this section. Project profile/experience material provided in annexes will not be evaluated.

³ Bidders shall utilize the CV template provided in Annex 3 to complete this section.

3	Some misunderstandings of the issues relating to the delivery of the TORs. Poor appetite to tailor to the Client's requirements where required. Generally, a low level of quality information and detail leading to insufficient confidence that they will deliver.
2	Major misunderstanding of the issues set out in the TORs. The information is poorly tailored to the requirements or of a low quality. Poor quality or lack of information provides low confidence that they will deliver.
1	Complete failure to address all material requirements of the TORs. Little or no tailoring of responses to meet customer requirements. Poor quality responses provide little or no confidence that they will deliver.
0	Unresponsive or non-compliant.

Only bids receiving a minimum score of 70% against the technical evaluation criteria will proceed to the financial evaluation stage.

Financial Proposal and Evaluation Criteria

Financial proposals must be in CAD and include all applicable taxes on a separate line. Payments will be made to the Supplier based on milestones connected to each deliverable or timesheets for **Fees** and actual receipts for **Reimbursable Expenses**. Financial proposals must be sufficiently disaggregated to allow evaluators to clearly understand where resources will be invested to ensure value for money. To this end, financial proposals must include the following line items:

Fees:

- Names, titles and all-inclusive daily rate per team member
- Level of effort per team member

Reimbursable expenses include⁴:

- International flights for trainers and trainees. GAC allows purchasing of economy airfare tickets. Agent, cancellation, and change fees are reimbursable if the change happens for project-related reasons. Standard Seat selection is reimbursable. Preferred seat selection and an upgrade to a premium economy or business class are not reimbursable.
- Daily allowances for trainers and trainees per NJC Travel Directive⁵
- Accommodation for trainers and trainees
- Local transportation & miscellaneous travel expenses
- Office space and/or venue rental
- Communications & reporting expenses
- Interpretation or translation costs

Reimbursable expenses will be subject to negotiation prior to contract award and subject to CTIF approval prior to reimbursement, which will be at cost.

CTIF **will not** reimburse costs for standard tools of the trade (e.g. portable personal computers) or COVID-related expenses.

The selected Service Provider will be solely responsible for arranging and paying adequate health, dental, medical and accident insurance coverage for all its Experts working on this project. The Service Provider shall also make reasonable efforts to ensure the individuals engaged in the delivery of this project obtain immunizations and out-of-country travel insurance as required.

⁴ Receipts must be retained for all expenses; the list of expenses is not exclusive.

⁵ <https://www.njc-cnm.gc.ca/directive/d10/en>

Financial proposals shall be evaluated as follows:

The following calculations will be used to determine your commercial score:

Commercial Criteria	Comment	Weighting
Competitiveness of fees	Mathematical calculation of competitiveness of the proposed daily fees in direct comparison to all tenderers in this competition. Lowest proposed fees/your proposed fees x 100	80
Competitiveness of expenses	Mathematical calculation of competitiveness of the proposed expenses in direct comparison to all tenderers in this competition. Lowest proposed expenses / your proposed expenses x 100	20

Determining best value offer

The weight given to the technical and commercial tenders are:

- Technical: 80%
- Commercial: 20%

Your total score will be determined using the following formula:

$$\text{Technical score} \times 0.8 + \text{Commercial score} \times 0.2 = \text{Final score}$$

10.0 RFP Timeline

CTIF will solicit proposals based on the timeline identified below:

Action	Date ⁶
Request for Proposals (RFP) issued	February 13, 2023
Deadline for confirming the intention to bid ⁷	February 22, 2023
Bid clarifications deadline (all bidders' questions and CTIF's responses will be shared with those who expressed interest)	February 28, 2023
Proposal submission deadline	March 13, 2023, 5pm EST
Anticipated project start date	March 2023

11.0 Proposal Submission Details

Your proposal should be submitted in English and be set out in three main parts. The Technical Proposal should be submitted in accordance with the Scoring Methodology and Evaluation Criteria and consist of:

Introductory Letter: A letter prepared on official letterhead by the Potential Supplier's lead organisation showing the full registered and trading name, registered office address, and place of incorporation of the Potential Supplier and, in the case of consortia, its joint venture or sub-contractor partners. It should be signed by a person of suitable authority to commit the Potential Supplier to a binding contract. The letter must also quote the RFP Title.

⁶ The RFP timeline is subject to change and in such case CTIF will notify all interested parties accordingly.

⁷ Mandatory: confirmations are to be sent via email to info@c-tif.ca.

Part A: Executive Summary: This one-page section should provide a clear and concise summary of the Potential Supplier's technical proposal, including its relevant corporate experience, approach and methodology, and nominated team.

Part B: Technical Proposal

1. Past corporate experience (**Annex 2** template)
2. Proposed approach and methodology (narrative, **Annex 5** and **Annex 6** templates)
3. Project management and oversight
4. CVs of the proposed team (**Annex 3** template)
5. Level of effort per nominated team member by quarter (**Annex 4** template)

Part C: Financial Proposal (**Annex 7** template)⁸ and a Rate Justification Form for each proposed expert (**Annex 8** template).

Proposals shall be submitted to CTIF by **March 13, 2023, 5 pm EST, by email to: info@c-tif.ca**

Proposals can be submitted by a single supplier, a consortium or a joint-venture arrangement.

Proposals must be submitted in two separate pdf format files. These may be attached as part of the same email.

- a. Introductory Letter, Parts A and B – Technical Proposal (one PDF file)
- b. Part C – Financial Proposal (one PDF file, **should be password-protected**).

We will request the password if your proposal is deemed technically compliant. Any submission of the financial proposal that is not password-protected will be disqualified. **Also, any submission of the financial proposal together with the password will be disqualified.**

Proposals shall be submitted to CTIF using the following subject lines:

- Bidder's name-069-CTIF– Technical Proposal
- Bidder's name-069-CTIF– Financial Proposal

CTIF will confirm receipt of your proposal.

12.0 Questions

Bidders may submit to CTIF questions and/or requests for additional information, including, without limitation, inquiries related to substantive portions of the RFP, timing, and clarifications related to the definition or interpretation of this RFP. All questions and/or requests must be submitted in writing by email to Natalia Barankevych at natalia.barankevych@cowater.com on or before **the bid clarifications deadline specified in section 10 above**. CTIF will respond to a timely submitted question and/or request for clarifications by issuing an addendum and/or response, which will be sent out to all parties who expressed interest in bidding on this project.

In the event you are the selected Service Provider in this procurement process, you will be expected to sign Cowater Sub-contractor Agreement and its General Terms and Conditions. A copy of this standard Agreement may also be requested from the CTIF team.

CTIF looks forward to receiving your proposal and thanks you in advance for your interest in CTIF procurement opportunities.

⁸ The budget template can be modified by the bidder.

Annex 1: Terms of Reference

Mandate Title:	Knowledge Sharing on Trade and Development Issues
Beneficiary Name(s):	Bureau of International Trade Relations, Department of Trade and Industry, Philippines

1.0 Background

The Philippines has been a WTO member since its foundation on January 1, 1995, and a member of GATT since 1979.

The Philippines aims to further integrate its firms, including women-led MSMEs, into the global production networks and value chains as stated in the Philippine Development Plan (PDP) 2023-2028, and has been actively participating in the WTO as well as in a number of RTAs, especially in the last two decades.

The Philippines, through its membership in ASEAN, has RTAs in place with Australia and New Zealand; China; India; Japan; the Republic of Korea; and Hong Kong, China. Negotiations for a Regional Comprehensive Economic Partnership (RCEP) Agreement between ASEAN and its five (5) FTA partners was concluded in November 2020, and the Agreement has already entered into force as of January 1, 2022, for all Parties, except the Philippines⁹. The Philippines also forged bilateral FTAs with EFTA and Japan and is currently in talks with other countries for FTAs at the bilateral and regional levels (i.e., PH-ROK, PH-EU, PH-UAE, CEPA, PH-India, ASEAN-Canada, ASEAN-EU, etc.). Many of these new FTAs are expected to include thematic topics traditionally found in historical FTAs that the Philippines has previously negotiated.

At the WTO, the Philippines is keeping pace with the emerging and non-traditional areas of trade negotiations. On the plurilateral front, along with other WTO members, the Philippines joined the Joint Statement Initiatives (JSI) on E-commerce, Investment Facilitation for Development, and Services Domestic Regulation, as well as the Informal Working Group on MSMEs, Trade and Gender, and the Dialogue on Plastics Pollution and Environmentally Sustainable Plastics Trade. The country is also an active member of the Cairns and G33 Groups.

Given the evolving nature and scope of trade agreements, it is important for experts and policymakers to share insights and views on these new and emerging areas and see how they will interplay in crafting trade policies, including making commitments in FTAs. In particular, the Philippines would like to understand better the perspectives and considerations of other countries, especially developed countries, who are strong in advocating new areas in FTAs such as: (i) emerging issues in trade in services such as, among others, domestic regulation, approach to the negative list, and cross-linkages of disciplines, (ii) trade and development issues, specifically environment, gender, labor, indigenous peoples, and culture and (iii) development of a reference text provisions on the issues above. Gaining a better understanding of such perspectives and considerations will be vital in supporting the further development of the Philippines' policy options on the issues above through its decision-making process. To this end, rather than being

⁹ Myanmar has already deposited its instrument of ratification (IOR) to the ASEAN Secretariat, but recognition of its IOR is an issue currently under discussion by ASEAN, considering the current situation in the country.

prescriptive, the desired approach for providing this technical assistance shall be through knowledge-/information sharing and the participation of experts as resource persons.

Policy Context

The WTO remains one of the primary platforms for setting international rules governing trade. As the scope of discussions continues to evolve in Geneva, it is imperative for countries, including the Philippines, to be familiar with emerging trade issues that go beyond the areas of traditional FTAs and the WTO.

The Philippines' trade policy agenda is reinforced by various domestic policies and initiatives that cut across various issues, such as competition policy, an enhanced regulatory environment, customs modernization, data privacy, tax reform, and infrastructure development. The Philippines' latest WTO Trade Policy Review, conducted in 2018, provides a useful overview of key trade policies and initiatives currently being undertaken.

Development Dimension

Trade has been a catalyst for development and economic growth and, in turn, instrumental in reducing poverty in many countries. The Philippines' participation in the global value chains and production networks, combined with its strong services sector, are the key drivers of the country's economic growth (amounting to approximately 6% annual growth before the pandemic).

More countries, including the Philippines, see trade as a means to achieve sustainable development goals. This has become the impetus for the emergence of discussions on trade and sustainable development issues within the WTO and RTAs/FTAs. The Philippines would like to ensure it is able to align its policies and commitments to ensure women, MSMEs, and underserved segments of society can benefit fully from the Philippines' participation in trade and sustainable development-related agreements and provisions.

2.0 Related Donor Activities

The Department of Trade and Industry (DTI) in the Philippines is a beneficiary of the EU-funded ARISE Plus Project, which lasts four years, from March 2021 until February 2025. The project's overall objective is to foster inclusive economic growth and poverty reduction in the Philippines by improving the country's trade performance and competitiveness in the global market. During the first year of implementation, technical assistance was focused on the following thematic areas: youth entrepreneurship, targeted MSME support, export quality and food safety, EU market access and FTAs, and trade facilitation, amongst other topics. Beyond this technical assistance from the EU, the DTI Bureau of International Trade Relations (DTI-BITR) is not receiving any other donor-funded support on trade and sustainable development issues covered in this proposal.

3.0 Linkage to CTIF Performance Measurement Framework

Results achieved will contribute towards advancing the following CTIF Immediate Outcomes:

1120: Increased ability of national and local governments to plan, develop, implement and measure policies, legislation and regulations supporting climate-smart and gender and socially inclusive trade and investment.

4.0 Description of the Assignment

4.1 Objectives

This CTIF mandate aims to build Philippine officials' capacity, particularly in DTI, to craft and develop more sustainable and emerging trade-related issues/provisions in FTAs. In parallel, this mandate aims to further integrate Philippine firms, particularly women-led MSMEs, into the global supply chain through greater awareness, increased trade, and a more predictable regulatory environment within the Philippines while in parallel meeting the Government's SDGs and other development commitments.

4.2 Beneficiary

The direct beneficiary of this mandate is the staff of the DTI-BITR, approximately 28 in total, and a minimum of 30 staff from other bureaus and/or attached agencies within DTI and other relevant agencies, including the DTI-Bureau of Philippine Standards, Board of Investments, DTI E-Commerce Office, National Economic and Development Authority, Professional Regulation Commission, Bangko Sentral ng Pilipinas Department of Labor and Employment, Department of Environment and Natural Resources, Department of Foreign Affairs, and Department of Justice among others. DTI is responsible for implementing and coordinating trade and investment policies and promoting and facilitating trade and investment. While the BITR engages and represents the Philippines in bilateral, regional, and multilateral trade and investment negotiations. Therefore, the direct beneficiaries, BITR staff, play an integral role in trade policy negotiations and are looking to build their capacity to negotiate high-quality trade agreements, including the newly emerging areas.

Secondary beneficiaries of this mandate include Filipino firms, specifically MSMEs, that will benefit from trade agreements and provisions to promote sustainable development and overall economic welfare.

4.3 Technical Assistance Activities

As part of this TA package, the Consultant(s) will deliver the following activities and deliverables under each Program Component.

4.3.1 Training Needs Assessment

The first step in this technical assistance will be for the Consultant(s) to conduct an assessment of the current capacity within BITR and other government agencies to understand technical issues on trade and sustainable development issues as well as their ability to negotiate these emerging areas into trade and investment agreements should the need arise. Further, the Consultant(s) will also be asked to engage officials from various agencies within DTI, especially those playing a role in the implementation and coordination of trade and investment policies and those responsible for their promotion and facilitation.

At the inception phase, the Consultant(s) and BITR will identify up to 4 priority topics that will be the subject of this TA's assessment and capacity-building components. The assessment may include topics such as:

1. Trade in Goods (including rules of origin, customs procedures and trade facilitation, and remanufactured goods)

2. Trade in Services (including Domestic Regulation, approach/transition to the negative list, cross-linkage to e-commerce disciplines)
3. E-commerce and digital trade
4. Trade and Gender
5. Trade and Environment
6. Labor provisions in FTAs
7. Investments

The Consultant(s) will be required to summarize their findings and recommendations into a final assessment report, which BTR will review.

4.3.2 Development of Capacity Building Toolkit

The Consultant(s) will be responsible for developing a capacity-building toolkit, which will largely be informed by the final assessment report, specifically, the (up to 4) priority topics identified and their recommendations to address the gaps within the BTR in the short- and medium-term. The toolkit will include: (i) a series of relevant knowledge products, such as short thematic briefs, to further BTR's knowledge of trade-related issues/provisions in FTAs, including the emerging issues; and (ii) training modules, including instructor and learner notes, to help BTR staff understand trade negotiations and the relevant provisions of trade agreements, but more importantly build their knowledge and capacity to negotiate future trade agreements.

Further, the capacity-building toolkit will need to align with the Government of the Philippines' priorities and international commitments. In addition, the toolkit will need to be modified following the successful delivery of capacity-building sessions to incorporate any relevant feedback from BTR officials.

4.3.3 Delivery of Capacity Building Sessions

Once the final training needs assessment report, particularly the recommendations for capacity-building sessions, has been approved by the BTR, the Consultant(s) will implement the capacity-building sessions using a combination of virtual and in-person sessions. The Consultant(s) may propose as many thematic areas as deemed necessary; however, the BTR would like to see the following topics incorporated into the capacity-building sessions:

- (i) Introduction to issues, concepts and terminologies;
- (ii) Comparative text analysis of sustainable development provisions to demonstrate options (e.g. Preamble, general exceptions, chapters/provisions, side agreements, etc.);
- (iii) Enforcement and dispute settlement options; and
- (iv) Developing policy options on emerging trade issues.

The desired approach for delivering the training will be through focused group discussions and/or knowledge-sharing sessions rather than a typical classroom-setting approach.

Following the conclusion of all capacity-building sessions, all materials and lessons learned will be incorporated into the training toolkit (as described above), which will be provided to the BTR upon the conclusion of the CTIF TA.

4.3.4 Development of Model Text Provisions

The Consultant(s) will also be responsible for developing, in collaboration with officials from BITR and other relevant agencies within DTI, simple and practical text provisions on the new and emerging areas within the WTO. The purpose of these text provisions is to provide officials with reference materials on trade policy formulation. These reference materials may also be used by other officials, particularly those involved in implementing and facilitating trade agreements, to help them understand how other countries implement such commitments. The Consultant(s) will prepare up to five (5) reference provisions on topics that will be determined during the inception phase.

4.3.5 Ad Hoc Advisory Support to the BITR

The Consultant(s) will support the BITR with analysis and/or expert advice on issues related to the topics covered in the capacity-building sessions for up to 30 levels of effort (LOE) days. Further, the Consultant(s) will provide inputs/insights necessary in trade and investment policy formulation, particularly incorporating emerging issues in trade and investment agreements.

5.0 Inputs to be provided by the beneficiary(ies)

The BITR will assign staff to support the implementation of this mandate. BITR officials will provide support in the following areas:

- i) providing relevant information/data related to the mandate, as deemed necessary, taking into account the confidentiality of documents.
- ii) facilitating the timely and efficient gathering of inputs and feedback from BITR officials and other relevant government institutions on the assessment report, capacity building toolkit, and where ad hoc support may be needed;
- iii) working with the Consultant(s) in exploring solutions and mitigating measures to implementation risks and challenges; and,
- iv) considering tangible ways to implement or follow through on the recommendations where they are deemed relevant and appropriate as determined by BITR, highlighted in training needs assessment report, especially those of a medium- to long-term duration.

6.0 COVID-19-related travel restrictions

CTIF anticipates some COVID-19-related restrictions on international travel to ease through the duration of this mandate's procurement and delivery. In this context, bidders are expected to propose an approach and methodology in which **Activities 4.3.1** and **4.3.3** can be carried out in person.

Given the anticipated loosening of COVID-19-related restrictions, the Consultant(s) are encouraged to propose both a fully virtual (online) and hybrid (part online, part in-person in Manila, the Philippines, where the main mandate proponents are located) delivery option for **Activity 4.3.1** (Training Needs Assessment) and **Activity 4.3.3** (capacity building sessions).

7.0 Consultant Profile / Expertise Required

The Consultant best suited to delivering this CTIF mandate will be able to demonstrate the following professional experience and capabilities both corporately and within their proposed team:

- At least five (5) years of experience in supporting various aspects of trade and investment agreement negotiations, including knowledge of emerging issues at the WTO;

- In-depth knowledge of FTAs, including goods, services (i.e., domestic regulations, approaches to the negative list, and cross-linkages of disciplines), and trade and development (i.e., environment, gender, labour, indigenous peoples, and culture), among others;
- Designing engaging reports and knowledge products in English for a variety of senior-level stakeholders, including recommendations to address capacity-building gaps;
- Design of capacity-building sessions and capacity-building toolkits, including overseeing their implementation and the development of knowledge products, such as reading materials and training modules adapted to the local context;
- Establishing processes and procedures for consultant mechanisms with diverse groups of stakeholders;
- Corporate experience delivering TA through donor-funded projects in one or more Southeast Asian countries and/or Pacific Island countries (having implemented similar projects would be considered a strong asset);
- Delivering stakeholder workshops and meetings remotely and in person using various engaging tools and techniques.
- Experience in providing technical assistance on gender equality and social inclusion, and/or environmental sustainability will be considered an asset, and
- The team is expected to include a local consultant/administrator to provide project management support to the overall team in the implementation of the project and to facilitate coordination of all deliverables with the beneficiary.

8.0 Location and Proposed Timeframe

Anticipated start date: March 15, 2023

Anticipated end date: February 28, 2024

Duration of assignment: 11 months

Location of assignment: Consultant's Home Office (remote); Manila, Philippines, for the capacity building sessions.

9.0 Deliverables

#	Deliverable	Deadline ¹⁰
1	<p>An Inception Report including the following contents:</p> <ul style="list-style-type: none"> An updated detailed Workplan, work schedule and budget for the delivery of the TA mandate; and, A completed CTIF mandate-level Performance Measurement Framework template (see Annex 1), including baseline data and targets against CTIF's mandate-level performance indicators. <p>This workplan and schedule must be designed in close collaboration with MCAE officials. The report must be approved by CTIF and the main beneficiaries for the Consultant to proceed with implementation.</p>	<p>Within 4 weeks of the contract signature</p>
2	<p>Training Needs Assessment: Assessment of BITR officials understanding of new and emerging issues within FTAs as well as their ability to negotiate trade and investment agreements with these issues. More details are provided in section 4.3.1.</p>	<p>Two months after the contract signature.</p>

¹⁰ Indicative. Final deadlines will be confirmed in the Consultant's Inception Report in collaboration with MCAE.

3	Development of Capacity Building Toolkit: as per details provided in section 4.3.2	4 months after the contract signature
4	Delivery of Capacity Building Sessions: as per the details provided in section 4.3.3.	7 months after contract signature.
5	Development of Model Text Provisions: development of simple and practical text provisions on the emerging issues at the WTO as per the details provided in section 4.3.4	8 months after contract signature
6	Ad Hoc Advisory Support to BITR: As per the details provided in section 4.3.5	Ongoing
7	Monthly Progress Reports: Brief (1 page) reports documenting progress achieved over the past month, priorities for the next month, and the status of key deliverables. Format to align with template provided in CTIF TA Handbook.	3 days before end of each month
8	Final Narrative Report on Mandate: The report shall: describe activities delivered and results achieved (versus initial expected targets and baseline); note lessons learned of relevance to future CTIF projects; provide recommendations, if any, for potential future follow-up TA support; document expenses incurred by the Consultant in carrying out this mandate; document officials trained/participating in the study's activities (i.e., name, gender, job title, institutional affiliation); and, include a one-page Story of Change to illustrate the change that has happened, or change that is occurring, as a result of this mandate against the Immediate Outcome noted in section 3.0 above (guidelines will be provided by CTIF).	Contract completion date.

Annex 2: Project Profile Template

Assignment name:		Country:
Location within Country:		Professional Staff Provided (names/titles):
Name and address of Client:		Duration of Assignment (months):
Start date (Month/Year):	Completion date (Month/Year):	Approx. Value of Services (CAD):
Name of Associated Consultants, if any:		No. of Months of Professional Staff Provided by Associated Consultants:
Narrative Description of the Project:		
Description of Actual Services Provided by the Bidding Organization:		

Assignments eligible for inclusion in a potential supplier's bid must have been active within **five calendar years** of the bid submission deadline for this CTIF mandate.

Annex 3: CV Template (max. 2 pages per CV)

Position		
Name and Citizenship		
Education		
Present Employer and Position: <i>if applicable</i>		
Length of Service with Current Employer and Status		
Pertinent Experience: <i>A summary of experience related to the rated requirements</i>		
Employment History: <i>A history of employment and assignments in reverse chronological order</i>		
Publications <i>(if applicable; limit to last 5 years)</i>		
References: <i>name, title, phone and email</i>		

Annex 4: Level of Effort (days) per Team Member by Quarter

	Q1	Q2	Q3	Q4	QX...
Name and position title					
Name and position title					
Name and position title					

Annex 5: Work Schedule by Month

	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	MX...
Activity 1												
Activity 2												
Activity 3...												
Legend:		Sustained TA				Intermittent TA				Milestone		

Annex 6: Activity Summary

Activity:			
Objective:			
Location:			
Task	Expected Deliverable	Responsibility (Team member)	Completion Date

Annex 7: Budget Template

Mandate/Project Title:				
Beneficiary Name:				
Bidder name:				
Budget Line	Description/Unit	Rate per day (CAD)	Total LOE (day)	Total budget cost (CAD)
Fees to Consultants				
First name, Last name	Position title			-
				-
				-
Sub-Total - 1. Fees to Consultants				-
International Travel Costs		Rate per unit	Total (units)	Total budget cost (CAD)
Airfare (regional)				-
Airfare (international)				-
Perdiems (country)				-
Perdiems (Canada)				-
Accommodation (country)				-
Accommodation (country)				-
Transportation				-
Transportation (airport transfer)				-
Visa				-
Visa	Visa (Canada)			-
Health insurance	per trainee (Canada)			-
Meeting costs	Room & equipment rental			-
Sub-Total travel costs				-
Training Costs		Rate per unit	Total (units)	Total budget cost (CAD)
Training material customization (information resources, stakeholder meeting, printing, production, communication costs)				-
Rent of facilities (Canada)	per day			-
Rent of facilities (country)	per day			-
Meals (Canada)	per person per meal			-
Meals (country)	per day			-
Interpretation	per day			-
Translation	lump sum			-
Stationery	per participant			-
Domestic travel of local consultant	per ticket			-
Accommodation in country	per night			-
Sub-Total Training Costs				-
HST or other applicable taxes				
Total Proposal Budget				-

*One working day = 7.5 hours

Annex 8: Rate Justification Form

Date:

Expert's name:

Client, Contract # and Date signed	Dates of assignment	Client Contact Name	Contact Phone #	Contract Duration (Days)	Daily rate	Hours worked/per daily rate	Nature of Services

Organization's Name and Signature

Annex 9: CTIF Mandate-level Performance Measurement Framework

Mandate Title	Knowledge Sharing on Trade and Development Issues	No.	CTIF 069
Country/Region	The Philippines	Budget (CAD)	TBC
QTE (Supplier)	TBD	Start - End date:	03/2023-02/2024
Beneficiary organisation (s)	<ul style="list-style-type: none"> Bureau of International Trade Relations, Department of Trade and Industry 	CTIF Immediate Outcome #:	1120
CTIF Ultimate Outcome Indicator(s)	1000	CTIF Intermediate Outcome Indicator(s):	1100.1, 1100.2
Mandate Summary:	CTIF will provide technical assistance to the Bureau of International Trade in the Philippines to craft and develop more sustainable and emerging trade-related issues/positions into newly negotiated trade and investment agreements.		

CTIF Ultimate Outcome: More inclusive, sustainable and poverty-reducing trade and investment in eligible Asia-Pacific countries				
CTIF Intermediate Outcome 1100	Outcome Statement	Indicators from PMF	Mandate Baseline	Mandate Target
	Improved policy-making practices among regional and national institutions in eligible Asia-Pacific countries for supporting climate-smart and gender and socially inclusive trade and investment.	1100.1 # of national or regional ministries, departments and agencies (MDAs) integrating gender and social inclusion considerations when preparing or revising trade and investment policies, legislation, or regulations.	0	1
		1100.2 # of national or regional MDAs integrating environmental and climate change considerations when preparing or revising trade and investment policies, legislation, or regulations.	0	1
CTIF Immediate Outcome 1120	Outcome Statement	Indicators from PMF	Mandate Baseline	Mandate Target

	Increased ability of national and local governments to plan, develop, implement and measure policies, legislation and regulations supporting climate-smart and gender and socially inclusive trade and investment.	1120.1 # of MDAs reporting increased confidence in existing internal processes and tools among staff to plan, develop, implement and measure policies, legislation and regulations supporting climate-smart and gender and socially inclusive trade and investment.	0	1
		1120.2 # of MDAs reporting improved knowledge and skills among staff, particularly female staff, to plan, develop, implement and measure policies, legislation and regulations supporting climate-smart and gender and socially-inclusive trade and investment.	0	1
CTIF Output 1121	TA provided to national MDAs to plan, develop, implement and measure climate-smart and gender and socially-inclusive policies, legislation and regulations supporting greater access to markets and financing for SMEs	1121.1 # of CTIF mandates delivered to national MDAs to plan, develop, implement and measure more gender- and socially inclusive policies, legislation and regulations supporting greater access to markets and financing for SMEs	0	1
		1121.2 # of MDAs receiving CTIF TA to plan, develop, implement and measure more gender- and socially inclusive policies, legislation and regulations supporting greater access to markets and financing for SMEs	0	1
		1121.3 Perceived utility of CTIF TA to MDAs to plan, develop, implement and measure more gender- and socially inclusive policies, legislation and regulations supporting greater market access and financing for SMEs.	n/a	5/6
Task 1	<i>Assessment Report on BITR's understanding of new emerging issues at the WTO and their incorporation in trade and investment negotiations</i>			
Task 2	<i>Delivery of Capacity Building Sessions</i>			
Task 3	<i>Development of Capacity Building Toolkit</i>			
Task 4	<i>Development of Model Text Provisions</i>			
Task 5	<i>Ad Hoc Advisory Support to BITR</i>			

