1. BACKGROUND INFORMATION

1.1 Beneficiaries

The beneficiaries to this project are, Antigua and Barbuda, Bahamas, Barbados, Belize, Dominica, Dominican Republic, Grenada, Guyana, Haiti, Jamaica, St. Kitts and Nevis, Saint Lucia, St. Vincent and the Grenadines, Suriname and, Trinidad and Tobago.

1.2 Contracting Authority

Caribbean Export Development Agency (Caribbean Export)

1.3 Relevant background

Caribbean Export is the regional trade and export development agency of fifteen (15) CARIFORUM States. Caribbean Export is seeking to recruit a suitably qualified Consultant to undertake the completion of a Regional Intelligence Portal. Named the CE Intelligence Portal, this portal forms an integral part of Caribbean Export’s work to develop a Regional Intelligence System aimed at identifying, collecting, collating and disseminating key strategic information to various stakeholders across the region as well as internationally. It is expected that this Intelligence System will provide a framework in which the provision of key strategic information will aide in the operating and decision making activities of the private sector and other key stakeholders.
The CE Intelligence Portal is an online platform designed to provide users with the ability to access key strategic information across a number of thematic areas. These thematic areas will include: (a) Trade and Business Intelligence, (b) Foreign Direct Investment, (c) Food Safety, and (d) Access to Finance. A fifth thematic area on the Services Sector will be added at a later stage.

It is anticipated that a wide cross section of stakeholders, such as regional private sector, trade and business support organizations, government institutions, investment promotion organizations, and external investors, will use and derive benefit from this service.

2. OBJECTIVE, PURPOSE AND EXPECTED RESULTS

2.1 Overall objective

The overall objective is to implement the CE Intelligence Portal, inclusive of the following thematic areas or components: (a) Trade and Business Intelligence, (b) Foreign Direct Investment, (c) Food Safety, and (d) Access to Finance.

2.2 Purpose

The purpose of this consultancy is to develop a CE Intelligence Portal as part of Caribbean Export Development Agency comprehensive Regional Intelligence System which aims to addresses the needs of our stakeholders.

2.3 Results to be achieved by the Consultant

The consultant is expected to deliver the following results:

Result 1
To develop the CE Intelligence Portal that integrates four (4) thematic areas or components:

1. Trade and Business Intelligence (TBI) (see Item 4.2.2)
2. Access to Financing Directory (see Item 4.2.3)
3. Food Safety (see Item 4.2.4)
4. FDI Database and Investment Map (see Item 4.2.5)

We envisage that this project will be done in four (4) stages.

Stage 1 will deliver components 1 and 3, that is, the TBI and the Food Safety sub sites:

   (a) Discuss and agree on the outline of the implementation concept for the development of CE Intelligence Portal.
   (b) A prototype of the CE Intelligence Portal or interface for integrated access that features the 4 thematic areas or components.
   (c) The TBI sub site with functionality that includes access to external data sources or international databases.
   (d) Migration of the Food Safety Portal to CE Intelligence Portal as a sub site.
   (e) Tiered access for National Trade Information Partners (NTIPs) and other selected key stakeholders. Additional information on the role and function of NTIPs will be made available.
   (f) A Dashboard for key stakeholders based on a pre-selected set of information needs. Information on selected areas of interest will be push to the dashboards for viewing when NTIPs and others sign into the Portal.
   (g) A global search that returns results based on the 4 thematic areas or databases.
   (h) RSS feeds that covers the four (4) thematic areas.

Stage 2 will deliver the Access to Financing sub site.

Stage 3 will deliver integration of the FDI Database and FDI Investment Map sub site.

Stage 4 will deliver a fully functional CE Intelligence Portal or interface for integrated access that features the 4 thematic areas or components. The Portal at this
stage of development should also be flexible to accommodate additional thematic areas or components. For example, development of a Services Sector database is likely to come on stream later in this project.

**Result 2**

The consultant will be a subject-matter expert on the CE Intelligence Portal providing in-depth knowledge from both a business and IT perspective. This involves conducting research to:

(a) Determine suitable data sources.
(b) Determine best practices for providing stakeholders including NTIPs with information customized to their needs.
(c) Determine best practice for analyzing qualitative and quantitative data and presenting information to stakeholders.
(d) Determine suitable technologies for developing and implementing the integrated access.

3. ASSUMPTIONS AND RISKS

3.1 Assumptions underlying the project intervention

Review of the submitted items is completed in a timely manner. The information we are seeking to capture and share is available (even at a cost).

3.2 Risks

The risk is that the above-mentioned assumption is not fulfilled and as a consequence the anticipated results and objectives of the project are not realized.

4. SCOPE OF THE WORK

4.1 General
4.1.1 The project involves development of the CE Intelligence Portal, which will serve as an information repository for incorporating the key 4 thematic areas or components as identified above. The following must be taken into consideration:

(a) The current version of the CE Intelligence Portal does not have a content management system (CMS).
(b) The Food Safety Portal already exists (see, www.caribfoodexport.com).
(c) The Access to Financing Directory must be developed as part of the CE Intelligence Portal consultancy (see example, www.findmsmefinancing.com.jm).
(d) Research towards the development of the FDI Database and Investment Map will be done under a separate consultancy based on its own TOR. The consultant for the CE Intelligence consultancy will work directly with the FDI research team in the development process to ensure a seamless integration into the CE Intelligence Portal.

4.1.2 Geographical area to be covered by the Consultant
CARIFORUM

4.1.3 Target groups
Regional private sector, trade and business support organizations, government institutions, investment promotion organizations, and external investors.

4.2 Specific Activities

4.2.1 In order to realize the objectives and results, the Consultant will be required to undertake the following tasks:

(a) Attend an inception meeting at the commencement of the contract to:
   1. Determine any additional requirements needed.
   2. Discuss the schedule of activities and logistics.
   3. Discuss and agree on the outline of the implementation concept for the development of CE Intelligence Portal.
(b) Design a prototype of the CE Intelligence Portal or interface for integrated access that features the 4 thematic areas or components.

(c) Design a TBI sub site with functionality that includes access to external data sources or international databases.

(d) Migrate the Food Safety Portal to CE Intelligence Portal as a sub site.

(e) Implement a tiered access to the Portal for NTIPs

(f) A Dashboard for key stakeholders based on a pre-selected set of information needs.

(g) Implement a global search that return results based on the 4 thematic areas or components.

(h) Implement RSS feeds that covers the four (4) thematic areas.

(i) Design the Access to Financing sub site.

(j) Design the FDI Database and Investment Map sub-site for integration into the CE Intelligence Portal.

(k) Recommend suitable data sources across all 4 thematic areas.

(l) Recommend best practices for providing stakeholders including NTIPs with information customized to their needs.

(m) Recommend best practice for analyzing qualitative and quantitative data and presenting the information to stakeholders.

(n) Recommend suitable technologies for developing and implementing the integrated access.

(o) Make a presentation of the proposed CE Intelligence Portal to the internal ICT focus group as well as demo the portal to Caribbean Export’s board of directors in Q4 of this year,

(p) Provide user and Portal maintenance training for selected Caribbean Export personnel.

(q) Provide user manuals.

4.2.2 Development of the Trade and Business Intelligence (TBI) Sub Site

4.2.2.1 Background
The TBI sub site is intended to be an online platform designed to provide users with the ability to access market reports on products, sector and country of interests. The key data the platform will report on will be trade or economic data, market or sector profiles and reports, tariff and non-tariff data, a business register or database of regional companies, trade agreements analysis, directory of business support organisations, trade regulation and related documentation, and links to important data sources.

4.2.2.2 Purpose
The purpose of this component is to further the development of the TBI sub site as part of Caribbean Export Development Agency comprehensive Regional Intelligence System aimed at addressing the needs of our stakeholders.

A basic version of what is proposed to be the new TBI sub site exists. This development was undertaken to test basic features and functionalities and obtain feedback from key internal and external stakeholders.

4.2.2.3 Objectives
The objective of this component is to build a TBI sub site on CE Intelligence Portal that has sufficient functionality and content to be of practical use to the target audience, particularly exporters. Thus, the TBI sub site must enhance and consolidate functionality on work completed. In order to realize the objectives, the Consultant will be required to undertake the key activities proposed for development of the TBI sub site at Appendix A.

4.2.3 Design of the Access to Financing Sub Site
4.2.3.1 Background
One of the major challenges facing CARIFORUM SMEs is access to finance. A large number of firms and budding entrepreneurs with great ideas still find it difficult to access appropriate financing in order to further their development and
growth. However research as shown that there are a number of different funding sources available to the private sector at the national and regional level yet what is lacking is information on these various funding mechanisms. These include Commercial Banks, Government Agencies, Multi-lateral sources, and Credit Unions, just to name a few.

On the demand side, persons seem unaware of these sources of these funds. It therefore begs the question; how can information on sources of financing for small and medium-sized firms be made available to the CARIORUM business? This project seeks to fill that information gap by providing accessible information on the various sources of funding.

4.2.3.2 Purpose
The purpose of this component is to implement an online web interface with a populated database of the various sources of funding available for SMEs, nationally, regionally and even internationally, to be housed at the Caribbean Export. This will enable firms, entrepreneurs and other regional stakeholders to access information on the different sources of funds from which persons can tap into for investment.

4.2.3.3 Objectives
The objectives of this component are:

1. To conduct secondary research in order to identify sources of financing for business projects.
2. To collect pertinent data and combine into a tabular form.
3. To develop reporting templates for database, build database and interface to capture pertinent data requirements.
4. To implement an online web interface and test reporting capabilities.

Note: An example of a similar directory is the Jamaican MSMEs Finance Directory located at www.findmsmefinancing.com.jm
4.2.4 Migrate the Food Safety Portal as a Sub Site

4.2.4.1 Background
Caribbean Export has developed a Food Safety Portal that provides simple and concrete steps for exporters and includes information such as entry requirements, as well as copies of all relevant forms and documents to familiarize the exporter with the process. Among other things, the resources provided will help you assess your company’s export readiness and develop an export plan.

4.2.4.2 Purpose
The purpose of this component is to migrate the Food Safety Portal to CE Intelligence Portal as a sub site.

4.2.4.3 Objectives
The main objective is to establish Food Safety sub site for market research, information sharing, knowledge management, networking, and e-commerce. The existing Food Safety Portal resides at Caribbean Export and can be found at www.caribfoodexport.com/

4.2.5 Design the FDI Database and Investment Map Sub Site

4.2.5.1 Background
The promotion of investment-ready opportunities or sectors is the mainstay of Investment Promotion Agencies (IPAs). IPAs serve as a direct source of information on investment projects being promoted by their governments and in some cases by the private sector in their countries. A significant part of the budget of an IPA is the development of collateral material to assist in the promotion of these opportunities. This collateral material is presented in hard or soft copy but often loses relevance in a short period of time as information on investment opportunities and contact information for IPA staff, for example, changes frequently. For the IPAs of the Caribbean, constraining budgets and an increasing demand on limited resources restrict their capacity to continuously provide the
financial resources required to sustain the constant production of promotional material.

This situation was also evident at the regional level. In 2012, with funding from the European Union, the Caribbean Association of Investment Promotion Agencies (CAIPA) developed an Investment Opportunities Catalogue to promote investment projects in the Caribbean. The catalogue contained 33 investment opportunities from 12 Caribbean territories. It was promoted on the websites of Caribbean Export Development Agency and CAIPA and was used in CAIPA’s marketing campaigns in 2012. By 2013, the Catalogue was no longer relevant as several of the investment opportunities had either received investments or were no longer being promoted and IPA staff contacts had changed.

It became apparent to CAIPA that a cost effective and more efficient alternative to developing the necessary collateral material was required. In addition, the promotion and effective dissemination of this material was also a consideration. The development of an electronic platform that has the capacity to generate reports on investment opportunities based on information that has been inputted is considered by CAIPA a viable alternative to the production of static reports. This alternative is an innovative one. Several regional IPAs have not yet developed a platform that is interactive and that allows investors and site selection firms to identify the necessary data required on investment opportunities in one given location for an entire region. Existing regional platforms include the InterAmerican Development Bank’s (IDB’s) Connect Americas portal.

CAIPA, through its Secretariat, Caribbean Export Development Agency, has secured funding from the IDB, under the Regional Public Goods Programme to realise this innovative initiative. This platform will be hosted on Caribbean Export’s CE Intelligence Portal and the CAIPA website.
4.2.5.2 Purpose

The purpose of this component is to design and build a sub site to integrate the FDI database and Investment Map into the CE Intelligence Portal.

4.2.5.3 Objectives

The main objective is to establish, through CE Intelligence Portal, an aggregate of information that includes access to FDI investing information. Note, the research needed to develop the FDI database and Investment Map will be done under a separate consultancy with funding from IDB. The consultant will therefore be required to work with this Consultant(s) to ensure that the information they generate is used to populate the FDI thematic sub-site of the Portal.

In achievement of this objective the consultant will be expected to deliver an electronic platform that allows for the presentation of investment opportunities across the region. The platform must demonstrate the following features and will entail the following work:

a. A user friendly and attractive system design or architecture based on an assessment of information that is readily available within the region;
b. System build-out based on an agreed upon design and functionalities;
c. An appropriate front-end for user interface and a back-end that allows for the uploading of data from several countries in the region. The front-end must contain a search feature for users;
d. Demonstrate the capacity to generate tailor-made reports based on user requests - (please reference the fDimarkets data platform);
e. The placement of Hyperlinks to each Member State IPA’s website;

The Copyright and all other intellectual property rights of whatsoever nature in any material produced, compiled or prepared under the provisions of this TOR, shall be vested exclusively in the Caribbean Export Development Agency.
4.3. Project management

4.3.1. Responsible body

The Caribbean Export Development Agency will be responsible for contracting the Consultant and ensuring the required outputs are achieved.

4.3.2. Management structure

The Manager, Competitiveness and Export Promotion will retain overall responsibility for the project and will report the performance of the project to Executive management. Day-to-day supervision of the activities of the project is the responsibility of the Senior Advisor – Information and Technology Management who will communicate progress to the Manager, Competitiveness and Export Promotion.

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

Not applicable.

5. LOGISTICS AND TIMING

5.1. Location

The Consultant must be a national of an African, Caribbean, and Pacific (ACP) State or of a European Union Member State and will be required to conduct most of the research from in-country assessments in beneficiary and must work closely with Caribbean Export management and staff.

5.2. Commencement date and period of implementation of tasks

The intended commencement date is 6th of May with a period of implementation of
the 12 months

6. REQUIREMENTS

6.1. Personnel

6.1.1. Key expert

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

(a) At least a Masters Degree in Information System Management (ISM) or Computer Science from a recognized tertiary institution or equivalent qualification;
(b) At least five (5) years post-qualification experience;
(c) In-depth knowledge of current web design trends and techniques;
(d) Demonstrated experience in ICT planning and IS analysis and design;
(e) Demonstrated knowledge or use of any of the following; Microsoft SQL Server 2008, MySQL, PostgreSQL;
(f) Good understanding of web server, application server, load balancing, sizing, clustering, access management, single sign-on, session management, and related technologies;
(g) Good understanding of key database concepts as applicable to application architecture;
(h) Proven experience in working in a participatory and consultative environment;
(i) Analytical skills, particularly the ability to conduct research and prepare appropriate findings and conclusions.

Interested and suitable candidates are required to submit a project proposal (technical and financial) as well as a resume addressed to:

The Executive Director
Caribbean Export Development Agency
1st Floor Baobab Tower,
Warrens, St. Michael,
Barbados.

6.2. Office accommodation
No office accommodation at the Caribbean Export is required for the key expert.

6.3. Facilities to be provided by the Consultant
The Consultant shall ensure that additional experts if required are adequately supported and equipped. In particular he/she shall ensure that there is sufficient administrative, secretarial and interpreting provision to enable him/her to concentrate on his/her primary responsibilities. The Consultant must also transfer funds as necessary to support the activities under the contract and to ensure that all employees are paid regularly and in a timely fashion.

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

7. REPORTS

7.1. Reporting requirements
The consultant will submit the following reports:

(a) Inception Report to be produced after two weeks from the commencement
of implementation. In the report the consultant shall highlight any difficulties encountered and/or foreseen difficulties in addition to submitting a detailed work programme. The consultant is advised to proceed with his or her work also in absence of comments by the Contracting Authority to the inception report.

(b) Documented agreed concept with system design should be presented no later than one week after completion of conceptualization and design phase.

(c) Progress Reports submitted monthly and at the end of each of the four (4) phases to the Senior Advisor – Information and Technology Management.

(d) Final report. The consultant shall submit a draft final report within one (1) week after completion of the project along with the project deliverables.

(e) Incorporating feedback, the consultant shall submit the final report along with the conclusion of all deliverables. The final report must be provided along with the corresponding invoice.

7.2. Submission & approval of reports

The reports referred to above must be submitted to the Manager, Competitiveness and Export Promotion with copy to the Senior Advisor – Information and Technology Management. All reports must be submitted in English in electronic format. The Manager, Competitiveness and Export Promotion is responsible for approving the reports.

8. MONITORING AND EVALUATION

8.1. Definition of indicators
Performance on the project will be measured by timely submission of the deliverables outlined in Section 4.2 and as outlined within the work plan. Feedback on each submitted Progress Report is not a requirement for the continuation of the project. The Contracting Authority will provide feedback to the consultant within 7 days of receipt of the final report.

8.2. Special requirements

None.
## Appendix A

### Key Activities Proposed for Development of the TBI Sub Site

<table>
<thead>
<tr>
<th>Ser</th>
<th>Activity</th>
<th>Description</th>
</tr>
</thead>
</table>
| 1   | Implementation of Content Management System (CMS) | The CMS must allow Administrators to easily create, update and manage the content of the site, including both static and dynamic content. Features to be provided include:  
  - Ability to add and update static content, such as the content of the home page  
  - Ability to upload new documents (e.g. reports, “Market Pointers”, etc. when required  
  - Ability to add or update document metadata such as title, product types, categorizations, country, etc. to facilitate searching  
  - Ability to remove documents (and related metadata) when required.  
  - Ability to create or update entries in “reference” tables such as Countries, Product Codes, Categories, Keywords, links to external sources, etc. |
| 2   | Implementation of System Administration feature. | This must provide a facility to manage users and access privileges as well as manage system security. Functionality required includes the ability to:  
  - Register portal users (create user accounts) and update user account information as required  
  - Activate or deactivate user accounts when required  
  - Manage user authentication and access privileges  
  - Manage overall Portal security |
<table>
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<tr>
<th>Ser</th>
<th>Activity</th>
<th>Description</th>
</tr>
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<tbody>
<tr>
<td>3</td>
<td><strong>Implementation of a Contact database</strong></td>
<td>Creation of a database of contacts and the functionality to manage and use the database. Includes:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Definition of a database structure suitable for capturing the data and relevant metadata (e.g. contact details, type of firm, products of interest, etc.)</td>
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<td></td>
<td></td>
<td>• Implementation of functionality to allow easy data entry and update by Administrators.</td>
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<td></td>
<td></td>
<td>• Implementation of functionality for import of contact data from appropriately formatted data sources.</td>
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<tr>
<td>4</td>
<td><strong>Improvement of search and results interface (vis-à-vis current portal)</strong></td>
<td>The search interface should make it easy for the user to identify and specify the countries, products and types of information of interest. The search interface should:</td>
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<tr>
<td></td>
<td></td>
<td>• Allow searches by both product name and HS Code</td>
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<td></td>
<td></td>
<td>• Allow the user to narrow down the types of results sought (e.g. “Profiles”, “Market Pointers”, etc.)</td>
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<tr>
<td>5</td>
<td><strong>Incorporation of existing searches currently available in Portal.</strong></td>
<td>The Portal must include the ability to execute the following searches, which are currently available in the portal:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• searches against <em>ITC Trade Map</em> database</td>
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<td></td>
<td></td>
<td>• searches for related product information against <em>CBI.eu</em> database</td>
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<tr>
<td></td>
<td></td>
<td>• searches for documents related to the product categories and countries specified.</td>
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<tr>
<td>Ser</td>
<td>Activity</td>
<td>Description</td>
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<tr>
<td>6</td>
<td>Redesign of database structure to better accommodate additional features and functionality</td>
<td>The database structure will need to be adjusted or re-created to accommodate the new features and changes proposed.</td>
</tr>
<tr>
<td>7</td>
<td>Redesign of overall Portal “look and feel” to accommodate the required feature</td>
<td>The Portal appearance and user interface, including both the static and dynamic sections, will need to be adjusted to accommodate the proposed changes.</td>
</tr>
<tr>
<td>8</td>
<td>Deployment Portal to suitable web host</td>
<td>This includes installation of the software, database and any other required components to a suitable web host, and configuration, testing and other activities as are necessary to make the Portal accessible and functional.</td>
</tr>
<tr>
<td>9</td>
<td>Incorporation of additional data sources that become available</td>
<td>Direct integration of data/information from 3rd party site onto the portal, defined by user query.</td>
</tr>
<tr>
<td>10</td>
<td>The incorporation of quantitative databases</td>
<td>Integration of data/information sets onto the portal</td>
</tr>
<tr>
<td>11</td>
<td>Incorporation of quantitative data analysis and presentation tools (“business intelligence” tools)</td>
<td>Implementation of a Business Intelligence/Analytics platform for more sophisticated reporting, visualization and analysis of quantitative data</td>
</tr>
<tr>
<td>Ser</td>
<td>Activity</td>
<td>Description</td>
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<tr>
<td>12</td>
<td>Increased granularity in management of user access to better tailor interfaces and outputs to user needs</td>
<td>Improve user access and query interface</td>
</tr>
<tr>
<td>13</td>
<td>Implementation of interfaces to National Trade Information Partners (NTIPs)</td>
<td>Tiered access levels to members of the NTIPs</td>
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<tr>
<td>14</td>
<td>Interactive Features</td>
<td>Such as surveys and forms with the ability to store, organize and present information</td>
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<tr>
<td>15</td>
<td>Events Calendar</td>
<td>Present past, ongoing and upcoming events</td>
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<tr>
<td>16</td>
<td>RSS Feeds</td>
<td>Capability to present string of RSS feeds</td>
</tr>
<tr>
<td>17</td>
<td>Social Media Integration</td>
<td>Embedded links that point to various social media platforms</td>
</tr>
<tr>
<td>18</td>
<td>News/Articles/Blog</td>
<td>Moderated blog functionality for posting articles, news, clippings, videos and other content</td>
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<tr>
<td>19</td>
<td>User Registration</td>
<td>Portal must have the option of letting users sign up for specific programs</td>
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<tr>
<td>20</td>
<td>Media</td>
<td>Allow for embedding of audio-visual media (including images, mp3, and video content)</td>
</tr>
<tr>
<td>21</td>
<td>Usage tracking software</td>
<td>Tracking software to produce user reports</td>
</tr>
<tr>
<td>22</td>
<td>Search Engine Optimization</td>
<td>Implementation of search engine optimization tool</td>
</tr>
<tr>
<td>23</td>
<td>Future Integrations</td>
<td>The portal should be built to able to be scaled to any future technologies.</td>
</tr>
</tbody>
</table>