

# REQUEST FOR QUOTATION (RFQ)

## FOR SERVICES

<b>Project Title:</b>	<b>Consultancy work to manage and disseminate of statistical codelists</b>
<b>Nature of the services</b>	The objective of the consultancy is to review, maintain and extend the Excel template used for the management of Pacific Data Hub .STAT statistical codelists and to deliver a process for generating machine-readable and human-readable versions of PDH .STAT codelists for publication.
<b>Location:</b>	Home based
<b>Date of issue:</b>	24/11/2022
<b>Closing Date:</b>	11/12/2022
<b>SPC Reference:</b>	22-4871

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## Part 1: INTRODUCTION

### 1.1 About the Pacific Community (SPC)

The Pacific Community (SPC) is the principal scientific and technical organisation of the Pacific region, established by treaty in 1947 with the signing of the *Agreement Establishing the South Pacific Commission* (the Canberra Agreement).

Our unique organisation covers more than 20 sectors and is renowned for knowledge and innovation in such areas as fisheries science, public health surveillance, geoscience and conservation of plant genetic resources for food security.

For more information about SPC and the work that we do, please visit our website: <https://www.spc.int/>.

### 1.2 SPC's procurement activities

SPC's procurement activities are guided by the principles of high ethical standards, value for money, open competition and social and environmental responsibility and are carried out under our Procurement Policy.

For further information or enquiries about SPC's procurement activities, please visit the procurement pages on our website: <https://www.spc.int/procurement> or email: [procurement@spc.int](mailto:procurement@spc.int)

### 1.3 SPC's Request for Quotation (RFQ) Process

At SPC, procurement valued at more than EUR 2,000 and less than or equal to EUR 45,000 requires an evaluation of at least three quotations to determine the offer that provides the best value for money through a Request for Quotation (RFQ) process.

This RFQ sets out SPC's requirements for a project and it asks you, as a bidder, to respond in writing in a prescribed format with pricing and other required information.

Your participation confirms your acceptance of SPC's conditions of participation in the RFQ process.

## Part 2: INSTRUCTIONS TO BIDDERS

### 2.1 Background

SPC invites you to submit a quotation to deliver the services as specified in [Part 3](#).

SPC has compiled these instructions to guide prospective bidders and to ensure that all bidders are given equal and fair consideration. Please read the instructions carefully before submitting your bid. For your quotation to be considered, it is important that you provide all the prescribed information by the closing date and in the format specified.

### 2.2 Submission Instructions

You must **submit your quotation and all supporting documents** in English and as an attachment to an email sent to [Elodiel@spc.int](mailto:Elodiel@spc.int) with copy to [sandrag@spc.int](mailto:sandrag@spc.int) and with the subject line of your email as follows: **Submission RFQ22-4871**. The email should also be copied to [rfq@spc.int](mailto:rfq@spc.int).

The supporting documents expected in this RFQ are:

- [The Conflict-of-Interest Declaration form](#) completed
- Technical proposal and financial bid forms completed and signed including a proposed workplan/methodology and timeframe

- A Curriculum Vitae

Your submission must be clear, concise and complete and should only include a quotation and information that is necessary to respond effectively to this RFQ. Please note that you may be marked down or excluded from the procurement exercise if your submission contains any ambiguities or lacks clarity.

Bids will be evaluated on the basis of information received by **midnight New Caledonia Time on 11/12/2022**.

### 2.3 Evaluation & Contract Award

Each quotation validly received will be assessed against the evaluation criteria matrix set out in [Part 4](#). Any changes in the evaluation criteria will result in the RFQ process being re-issued.

SPC may award the contract once it has determined that a bidder has met the prescribed requirements and the bidder's proposal has been determined to be substantially responsive to the RFQ documents, provide the best value for money (highest cumulative score) and best serve the interests of SPC.

In the event of a bid being accepted, procurement will take place under SPC's [General Terms and Conditions of Contract](#) and depending on the value or nature of the procurement, the award will be made by issuing a purchase order or a signed and dated contract, or both.

### 2.4 Key Contacts

Please contact SPC should you have any doubt as to what is required or if we can help answer any questions that you may have.

Mr Denis Grofils will be your primary point of contact for this RFQ and can be contacted at [denisg@spc.int](mailto:denisg@spc.int). You should copy any communications into [rfq@spc.int](mailto:rfq@spc.int).

Details will be kept of any communications between SPC and bidders. This assists SPC to ensure transparency of the procurement process. While SPC prefers written communication in the RFQ process, at any point where there is phone call or other conversation, SPC expects to keep a file note of the exchange, with all forms of communication with prospective bidders to be retained as source documents for the procurement of the services.

### 2.5 Key Dates

Please see the proposed procurement timetable in the table below. This timetable is intended as a guide only and while SPC does not intend to depart from the timetable, it reserves the right to do so at any stage.

STAGE	DATE
<b>RFQ sent to potential vendors</b>	24/11/2022
<b>RFQ Closing Date</b>	11/12/2022
<b>Award of Contract</b>	16/12/2022
<b>Commencement of Contract</b>	20/12/2022
<b>Conclusion of Contract</b>	31/03/2023

### 2.6 Legal and compliance

**Confidentiality:** Unless otherwise agreed by SPC in advance or where the contents of the RFQ are already in the public domain when shared with the bidder, bidders shall at all times treat the contents of the RFQ and

any related documents as confidential. SPC will also treat the information it receives from the bidders as confidential.

**Conflict of interest:** Bidders must take all necessary measures to prevent any situation of conflict of interest. You must notify SPC in writing as soon as possible of any situation that could constitute a conflict of interest during the RFQ process. If you have any familial connection with SPC staff, this must be declared, and approval will then be sought for you to engage in the RFQ process. **In support of your response to this RFQ, you must submit to SPC [the Conflict-of-Interest Declaration form](https://spc.int/procurement) available on our procurement page website: <https://spc.int/procurement>.**

Breach of this requirement can result in SPC terminating any contract with a successful bidder.

**Currency, validity, duties, taxes:** Unless specifically otherwise requested, all proposals should be in Euro and NZD and must be net of any direct or indirect taxes and duties, and shall remain valid for 120 days from the closing date. The successful bidder is bound by their proposal for a further 60 days following notification they are the preferred bidder so that the contract may be awarded. No price variation due to escalation, inflation, fluctuation in exchange rates, or any other market factors shall be accepted at any time during this period.

**No offer of contract or invitation to contract:** This RFQ is not an offer to contract or an invitation by SPC to enter into a contract with you.

**Privacy:** The bidder is to comply with the requirements of applicable legislation and regulatory requirements in force for the use of personal data that is disclosed for the purposes of this RFQ. SPC will handle any personal information it receives under the RFQ in line with its [Privacy Policy](#), and the [Guidelines for handling personal information of bidders and grantees](#).

**Warranty, representation, assurance, undertaking:** The bidder acknowledges and agrees that no person has any authority to give any warranty, representation, assurance or undertaking on behalf of SPC in connection with any contract which may (or may not) follow on from this RFQ process.

## 2.7 Complaints process

Bidders that consider they were not treated fairly during any SPC procurement process may lodge a protest. The protest should be addressed to [complaints@spc.int](mailto:complaints@spc.int). The bidder must provide the following information: (1) full contact details; (2) details of the relevant procurement; (3) reasons for the protest, including how the alleged behaviour negatively impacted the bidder; (4) copies of any documents supporting grounds for protest; (5) the relief that is sought.

## Part 3: TERMS OF REFERENCE

### A. Background/context

#### The Pacific Data Hub and its .STAT statistical database

The Pacific Data Hub (PDH) aims to be the central access point for public information about the Pacific. A flagship component of this initiative is “PDH.STAT”, a statistical indicators database designed to publish high value statistical datasets leveraging modern standards and technologies in the area of open data.

PDH .STAT Data Explorer is the Graphical User Interface giving access to .STAT statistical content and is accessible on the Web at this address:

<https://stats.pacificdata.org/>

The general PDH data catalogue in which .STAT content is registered (among other resources) is accessible at the following address:

<https://pacificdata.org/>

PDH.STAT is an instance of .Stat Suite, a product developed by the Statistical Information System Collaboration Community (SIS-CC). The .Stat Suite, based on the Statistical Data and Metadata eXchange (SDMX) standard, is designed to support production and dissemination of timely, high-quality statistics that can be easily re-used.

For more info on .Stat Suite, see the following links:

- SIS-CC home page: <https://siscc.org/>
- .Stat Suite online documentation: <https://sis-cc.gitlab.io/dotstatsuite-documentation/>
- SDMX official website: <https://sdmx.org/>

#### Role and accessibility of statistical codelists in the Pacific Data Hub .STAT database

Statistical codelists play a crucial role in statistical production, as they provide the semantic backbone on which statistics are built and are key in enabling the dissemination of interoperable datasets.

Data published on PDH.STAT is mostly built on a common set of codelists. About 50 common codelists are used at this stage. The list of all codelists used in PDH.STAT is accessible using the SDMX Application Programming Interface (API) with this URL:

<https://stats-nsi-stable.pacificdata.org/rest/codelist?detail=allstubs>

Currently Excel files are used to manage content of different codelists and generate SDMX versions loaded to PDH.STAT (one workbook per codelist). The following information is stored for each code in the different code lists: code, code label in English, code label in French, parent code, order of the code in English, order of the code in French. SDMX fragments are generated directly in the workbooks using formulas and pasted in SDMX-ML templates. Information at the level of the codelists such as name and description of the codelists (in English and French) are stored directly in SDMX artefacts (in XML).

Information provided by codelists is embedded in .STAT Data Explorer and presented to users in table views, in the tables themselves form the display of category labels and in the filtering panel.

## B. Purpose, objectives, scope of services

The objective of the consultancy is to

- Review, maintain and extend the Excel template used for the management of PDH. STAT statistical codelists;
- Deliver a process for generating machine-readable and human-readable versions of PDH. STAT codelists for publication.

At this stage around common 50 codelists are pre-identified.

The process should be written using an open-source language, Python would be preferred. The process should allow generating publication versions of codelists for the initial set of codelists but also produce updated versions and handle new codelists whenever it is necessary.

Publishing resources on the Web and attaching documents to PDH.STAT datasets is out of scope of the consultancy.

Translation of text from English to French for the templates or the content of codelists is out of scope of the consultancy.

### **Task 1: Validate the list of information to be managed for PDH.STAT codelists**

At this stage the following information is registered for each code: code, code label in English, code label in French, parent code, order of the code in English, order of the code in French.

New information need to be included in management templates:

- At the level of the codelist: Title and description in English and French.
- At the level of the codes: short label, full name, original code.
- Regarding code hierarchies: Currently hierarchies take into account presentation constraints (f.i. having sometimes total and 1<sup>st</sup> level together rather than in a hierarchy for the purpose of display in .STAT Data Explorer). The actual hierarchy allowing for instance to perform aggregations is to be added to codelists workbooks.

Support for English and French must be implemented for all annotations.

The result of this task will be to confirm a standard list of information to be stored for each codelist and for each code in scope.

### **Task 2: Upgrade content of current Excel workbooks to new template**

For each codelist a new Excel template will be prepared in line with the new set of information specified and content will be migrated from former workbooks.

The following will need to be added where relevant:

- Full name is an explicit label to be used when a code is displayed without its parent, this is to be added where relevant (when there is a hierarchy and when codes could be difficult to understand without information about parent codes). The main case identified for this so far is the geographical codelist but some others could be included.
- Original code: in some cases SDMX code differs from the original classification code provided in official documentation, original codes can be included in a specific annotation (main case of this is having dots replaced by underscores to make them SDMX-compliant).

Short name will be included in the templates as a possibility but no specific content will need to be prepared for this attribute as part of the consultancy.

**Task 3: Specify output formats for codelists**

This task will result in a formal specification of outputs in the 3 output formats required for codelists managed for PDH.STAT in Excel workbooks:

- SDMX 2.1 format will need to be produced according to the official SDMX specification as this is the format in which codelists are loaded to PDH.STAT. Some of the information will be represented using directly the SDMX model (e.g. codes and code descriptions), others will be included as annotations in line with SDMX guidelines for annotations and with the .Stat Suite implementation of SDMX.
- CSV: List of columns to be included in CSV versions of the codelists that will be published, also specification of general elements such as agreement on encoding and filename.
- PDF: Specification of the layout of the template for generating PDF versions of codelists. The documents will include general information on the codelist and the list of code with a series of attributes to be confirmed, but including code and code labels. In this task a mock-up will be prepared to agree precisely on the layout to be used for codelist reports, including logos, colours, fonts, frames, headers and footers, treatment of empty fields, etc. This will be the basis to prepare the template used to actually generate the PDF documents.

**Task 4: Develop a program for producing SDMX, CSV and PDF versions of codelists from Excel**

This task covers the development of a computer program allowing to generate output formats (SDMX, CSV and PDF) for codelist managed in standard Excel workbooks for PDH.STAT. The program will take the identification of the Excel file as input and will produce the SDMX, CSV and PDF versions of the classification.

Handling of warning and errors during the process need to be implemented and message provided must allow to fix issues encountered with the processing of Excel templates.

This task will result in the delivery of source code which includes explanatory comment and accompanied by a document explaining its use.

**Task 5: Validate the process by reviewing generated material**

In order to ensure the process is working correctly, outputs (SDMX, CSV and PDF) will be generated for all codelists and be reviewed to identify possible issues that will be corrected in the generation program.

This task will result in 3 files available for each codelist used on PDH.STAT, this material having been reviewed and approved by SPC.

**C. Timelines**

A total of 20 working days are required under this contract, from the signature of the contract to the 6<sup>th</sup> of March 2023.

Tasks	Outputs	Estimated deliverable time	No of days	
1	Validate the list of information to be managed for PDH.STAT codelists	List of information to be stored for codelists.	16.01.2023	2 days



2	Upgrade content of current Excel workbooks to new template	New Excel workbooks for each codelist in scope.	30.01.2023	7 days
3	Specify output formats for codelists	Specification of outputs in SDMX, CSV and PDF.	06.02.2023	2 days
4	Develop a program for producing SDMX, CSV and PDF versions of codelists from Excel	Computer program to generate output formats (SDMX, CSV and PDF) for codelist managed in standard Excel workbooks for PDH.STAT.	20.02.2023	7 days
5	Validate the process by reviewing generated material	3 files available for each codelist used on PDH.STAT	06.03.2023	2 days

#### D. Reporting and contracting arrangements

##### Reporting and Institutional Arrangements

The Contractor will work under the direct supervision of Mr Denis Grofils, Statistics Advisor Data Systems at the Statistics for Development Division of the Pacific Community. Weekly progress meetings will be held.

##### Place of Assignment

The work will be desk-based at the consultant's usual work location. No travel will be required.

#### E. Skills and qualifications

The successful contractor will have:

- Education: University degree in statistics, mathematics, IT or other related discipline.
- Knowledge and experience:
  - Minimum of 5 years of demonstrated experience in data and metadata management in the field of statistics, data science or IT;
  - Broad statistical experience, particularly in general statistical concepts, data collection and analysis techniques and metadata-driven approaches;
  - Computer literacy, in particular as it relates to data processing (e.g. Python);
  - Demonstrated experience using and implementing SDMX metadata standards;
  - Good interpersonal skills, team player with ability to network and effectively work in a multicultural setting, and with other agencies in the region involved in statistical work, able to work with stakeholders and must have good communication skills;
  - A demonstrated understanding of the ToRs and the required outputs. Good time management and the ability to meet deadlines.

## F. Scope of Bid Price and Schedule of Payments

The contract is lump sum payments based on 2 groups of deliverables:

- The first 3 deliverables: Matrix with metadata headings/items and sources and template for metadata reports.
- The last 2 deliverables: Program to generate consolidated metadata reports and approved metadata report for each dataset published on PDH.STAT.

The bidder must include all costs including professional fees, management and operating costs, and any other administrative costs in the contract price.

The terms of payment shall be in accordance with the provisions of Article 10 of the SPC General Conditions.

SPC shall make payments to the Contractor according to the following payment schedule and associated milestones:

Milestone/deliverables		Estimated deliverable time	Working days payment
1	List of information to be stored	16.01.2023	0
2	New Excel workbooks for each codelist	30.01.2023	0
3	Specification of outputs in SDMX, CSV and PDF	06.02.2023	11
4	Computer program to generate output formats for codelists	20.02.2023	0
5	3 output files available for each codelist	06.03.2023	9
<b>TOTAL</b>			<b>20</b>

## Part 4: PROPOSAL EVALUATION MATRIX

### 4.1 Competency Requirements & Score Weight

The evaluation matrix below reflects the obtainable score specified for each evaluation criterion (technical requirement) which indicates the relative significance or weight of the items in the overall evaluation process.

Evaluation criteria	Score Weight (%)
University degree in statistics, mathematics, IT or other related discipline.	10%
Minimum of 5 years of demonstrated experience in data and metadata management in the field of statistics, data science or IT.	10%
Broad statistical experience, particularly in general statistical concepts, data collection and analysis techniques and metadata-driven approaches.	20%
Computer literacy, in particular as it relates to data processing (e.g. Python).	20%
Demonstrated experience using and implementing SDMX metadata standards.	20%
Demonstrated understanding of the ToRs and the required outputs based on proposed methodology and workplan	20%
<b>Total Score</b>	<b>100%</b>