

# REQUEST FOR QUOTATION (RFQ)

## FOR SERVICES

<b>Project Title:</b>	<b>International Finance and Political Economy Analysis and Reporting</b>
<b>Nature of the services</b>	<b>Consultancy</b>
<b>Location:</b>	Consultant's home-base
<b>Date of issue:</b>	22/11/2023
<b>Closing Date:</b>	11/12/2023
<b>SPC Reference:</b>	RFQ23-6016

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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 [karenal@spc.int](mailto:karenal@spc.int); [clairel@spc.int](mailto:clairel@spc.int) and [procurement@spc.int](mailto:procurement@spc.int) and with the subject line of your email as follows: **Submission RFQ23-6016 – International Finance and Political Economy Analysis and Reporting**. 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
- CV of the proposed consultant (s), specify the composition if it is a team proposal

- Sample of similar projects including written material
- Your financial proposal as a lumpsum, in EUR

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 **11.59 pm New Caledonia Time on 11/12/2023**.

### 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.

SPC's Project Manager, Partnerships, Integration, and Resource Mobilization will be your primary point of contact for this RFQ and can be contacted at [karenal@spc.int](mailto:karenal@spc.int) (copy [clairel@spc.int](mailto:clairel@spc.int) and [procurement@spc.int](mailto:procurement@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
RFQ sent to potential vendors	22/11/2023
RFQ Closing Date	11/12/2023

### 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 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

This Terms of Reference (ToR) document outlines the context and objectives of a short-term consultancy, referred to hereafter as "the Consultant," to collaborate with the Pacific Community (SPC) on a comprehensive analysis and review of international development finance and funding consortia relevant to the Pacific, both at the regional and national levels. This review will encompass regional and global case studies that hold potential relevance for Pacific Countries and Territories, including those not eligible for official development aid (ODA).

Climate Finance and Climate Justice are inextricably linked in the Pacific context. Climate Finance primarily originates from nations that bear significant responsibility for climate change, yet the Pacific region currently receives a disproportionately small share of development funding, an incongruity with the urgent need to address pressing challenges and mitigate the impact of climate change. Recognizing ongoing efforts to address this disparity, our primary objective is to effect substantial change, facilitating a more equitable distribution of Climate Finance across the Pacific region.

Across the Blue Pacific Continent, traditional partners and multilateral funds continue to play a pivotal role in Pacific development. To meet their collective administrative requirements and cater to the unique requirements of smaller nations, the necessity for more streamlined funding mechanisms that are also capable of effectively managing and reporting on larger investments becomes evident.

Closing the substantial financing gap in the Pacific necessitates enhanced access to catalytic, flexible, and risk-tolerant funds. To achieve this, it is imperative to diversify partnerships and funding sources. For example, philanthropic funds can offer greater flexibility to allocate funding where traditional sources and official development aid doesn't target. In this way philanthropic funds have the potential to make a significant impact, especially where capability or capacity needs to be strengthened within institutions and as such, hold immense value for the Pacific. Cultivating a more diverse funding portfolio will empower the Pacific to not only execute major cross-cutting multi-disciplinary initiatives (eg climate mitigation and adaptations activities) but also remain agile in addressing emerging challenges, adapting to new evidence or science, and seizing development opportunities as they arise.

#### **Pacific Context**

Our Pacific Leaders have articulated a visionary 30-year plan for the prosperity of people and nature, encapsulated in the 2050 Strategy for the Blue Pacific Continent, launched in 2022. This high-level strategic framework, underpinned by Pacific unity and solidarity, underscores the region's custodianship of the Blue Pacific Continent. It emphasizes collective responsibility, unwavering commitment, and strategic investments in safeguarding the Blue Pacific Continent by 2050. Leaders have underscored the imperative for concrete actions and further deepened their commitment to regional solidarity as the path forward.

SPC, as a founding member of the Council of Regional Organizations in the Pacific (CROP), collaborates extensively with CROP and other partners in pursuit of sustainable development for Pacific communities, the ocean, and its life-giving biodiversity and resources. In our pursuit to enable and empower Pacific

communities to realize their articulated development aspirations, SPC closely collaborates with its Members, the Pacific Islands Forum Secretariat (PIFS), the Office of the Pacific Ocean Commissioner (OPOC), the Pacific Regional Environment Programme (SPREP), the Forum Fisheries Agency (FFA) and other stakeholders. Our approach entails embracing "futures thinking" as a cornerstone strategy for resource mobilization, aiming to achieve targeted impacts and results.

We are actively forging and enhancing strategic relationships with partners who share our values regarding Pacific communities and livelihoods, environmental justice, and nature preservation. We are keen to collaborate with philanthropic partners who share a commitment to an approach that is "by and for Pacific," addressing development financing gaps, environmental concerns, and supporting initiatives that enhance the well-being of our communities and the planet.

### **Our Intentional Approach to accessing new 'markets': Co-Creation and Collaboration**

This consultancy is part of a broad initiative that represents a collective endeavour to achieve transformational impacts across the Blue Pacific Continent at scale and at regional, sub-regional, national, and local levels. It is guided by a people-centered approach that underscores the application of Pacific values such as enginkelap (generosity), katiakitanga (stewardship), gida gaituvwa (unity), and aroha (care). We intentionally seek methods and tools that embody this people-centred ethos, and co-creation serves as our guiding principle. In creating an environment conducive to co-creation, we transcend mere knowledge sharing or learning from diverse stakeholders. Instead, we embark on interactive and continuous engagement with those who are affected by or well-positioned to address the challenges and opportunities at hand. Co-creation is integral to developing partnerships that catalyse systemic impacts—what we term "transformational partnerships." These partnerships yield enduring outcomes that drive changes in social and business norms, reshape market systems and network structures, and influence industry-wide behaviour.

## **B. Purpose, objectives, scope of services**

### **Purpose**

The purpose of this consultancy is to provide SPC with comprehensive and concise analysis of existing funding consortia including financial, political economy, operational and management perspectives.

### **Scope of Services**

The scope of this work entails a comprehensive desktop review and the production of three tailored reports provided by an expert Consultant with Pacific operational expertise in either development/aid or finance management in a public sector environment. Each of the tailored reports is informed by in-depth analysis and expert-driven insights.

### **Consultancy Approach is action and policy oriented:**

Given the constraints of timing and the depth of research required, the following components will be central to the implementation approach:

#### Expert Finance and Policy Analysis

- The Consultant will have subject matter expertise in financial management and political economy and policy analysis with a working knowledge of key areas relevant to the Pacific including governance, official development aid, climate finance, hybrid financing mechanisms, Pacific regional governance, and sustainable development. The ideal candidate will then apply this expertise and experience to the analysis. The key deliverables are intended to be action-oriented and suitable for sharing with senior-level officials or Ministers.

#### Financial Operating Structure Analysis:

- A rigorous analysis will be conducted to explore various financial operating structures, including private-public partnerships and official development aid.
- This analysis will adopt a political-economic lens to align funding mechanisms with the business case and support the initiative's overarching goals. The key deliverables are intended to be policy-oriented and capable of being transformed into white papers in the future.

#### Financial Models and Recommendations:

- The Consultant will formulate recommendations for financial models, considering benefits, costs, key performance indicators (KPIs), best practices, and future-oriented financial approaches.
- These recommendations will be based on a thorough analysis of available data and case studies, with an emphasis on their suitability for the Pacific context. The key deliverables are intended to be policy-oriented and capable of being transformed into white papers in the future.

#### Impact Assessment and Risk Mitigation:

- An in-depth assessment of the potential impact of proposed financial mechanisms will be carried out, with a keen focus on risk identification and mitigation strategies.
- The Consultant will analyse and evaluate risks associated with different types of financing, aiming to provide comprehensive risk management recommendations.

#### **Collaborative Approach**

##### Knowledge Sharing and Collaboration:

- While the primary focus is on expert analysis and research, collaboration between the Consultant and SPC key contacts will be essential to ensure relevant and informed set of reports that may be shared with SPC members and its external Audit and Risk Committee if required.

##### Cultural Responsiveness and Capacity Building

- The consultant will employ culturally responsive approaches.
- Pacific experiences and expertise will be valued and incorporated into the recommendations.

### **C. Timelines**

#### **Timeline and Deliverables**

The final deadline for delivery of all documents is **31 January 2024**. A detailed timeline, milestones, and deliverables will be agreed upon with the consultant to ensure alignment with project objectives and the contractual period.



**Deliverables:**

The Consultant is required to **deliver three separate reports:**

1. Comprehensive Desktop Literature Review Report:
  - Maximum of 40 pages.
  - Detailed analysis of funding consortia, including application and implications for the Pacific, supported by comprehensive development and global political-economic analysis, along with a succinct literature scan focusing on hybrid financing mechanisms and modalities relevant to the development/aid operating context.
  
2. Findings Report:
  - Maximum of 10 pages.
  - Clear presentation of findings and/or recommendations for a potential new funding consortium in the Pacific, including visualizations such as a funding model blueprint.
  
3. Summary Document:
  - Maximum of 10 pages.

A concise summary of key findings and recommendations from the comprehensive desktop review, featuring data visualizations, key case studies, and supporting materials for clarity and accessibility to a broader audience.

**D. Reporting and contracting arrangements****Duty station and travel**

The consultancy will be conducted remotely, with no travel requirements. The Consultant will engage with SPC key contacts and project team through email and virtual meetings on the Teams or Zoom platform.

**Reporting and Contracting Arrangements**

The Consultant's work will be overseen by the Project Manager in the Partnerships, Integration, and Resource Mobilization Office (PIRMO), who will provide day-to-day management and supervision of the contracted tasks. The primary point of contact for the Consultant within SPC will also be the Project Manager, PIRMO. This primary contact will be responsible for approving deliverables in accordance with agreed-upon timelines, decisions related to any potential travel, and the processing of associated payments.

Considering the condensed timeline, regular updates and check-in meetings between the Consultant and SPC are essential and will be mutually agreed upon. The Consultant will maintain consistent communication with the PIRMO Project Manager to provide updates on the progress of their work. The specific timeline for these updates is outlined in the Timeline section of this document, with the possibility of additional updates as needed, to be discussed and mutually agreed upon by the Consultant and SPC.

Furthermore, the Consultant will collaborate closely with the PIRMO Project Manager and on occasion, the broader SPC team. These interactions will enable the Consultant to receive additional guidance, relevant information, and insights to enhance the quality and effectiveness of their work.

## E. Skills and qualifications

**Minimum Years of Work Experience:** The Consultant should ideally have a minimum of 10 years of work experience in international development finance, political economy, and policy analysis.

**Special Skills, Experience and Other Qualifications:** The following qualifications and expertise are required for the successful completion of this work. We are looking for an “expert generalist” with relevant experience in the Pacific:

1. **International Finance Expertise:** Given the strong emphasis on closing the financing gap in the Pacific, expertise in existing financing models across different sectors – including public and private sectors – is critical. Knowledge of finance models in areas pertaining to Pacific development priorities is also critical.
2. **Political Economy:** Proficiency in political economy is essential as it plays a pivotal role in aligning financing mechanisms with government policies, regulations, and international development dynamics. This knowledge will help ensure that financing mechanisms are strategically aligned with the regional and global goals outlined in the 2050 Strategy for the Blue Pacific Continent.
3. **International Development and Donor Landscape Knowledge:** Familiarity with international development partners and projects in the Pacific and the donor landscape more generally is crucial, as the Consultant will need to understand donor requirements and procedures in order to selectively compare, contrast, and suggest findings that are policy-oriented and action-oriented.
4. **Writing and editing:** we are looking for a consultant with a demonstrated track record of producing these types of reports. We are specifically looking for expert economic and financial research presented in a concise, structured and accessible format. We are looking for demonstrated professional experience in writing and editing economic publications and reports.

Additionally:

1. **Pacific Regional Experience:** Experience working on the ground in Pacific Island Countries and Territories (PICTs) and a deep understanding of the key issues confronting the region.
2. **Financing Models:** Proven expertise in analysing and understanding financing mechanisms, including public-private partnerships and philanthropic funding, with a track record of achieving sustainable development outcomes.
3. **Cultural Sensitivity:** A track record of relating effectively with diverse Pacific communities and stakeholders, demonstrating cultural sensitivity and respect for Pacific values, traditions, and perspectives.
4. **Research and Analysis:** Strong research and analytical skills to gather and analyse data, case studies, and relevant information to support evidence-based decision-making and recommendations.
5. **Risk Assessment and Mitigation:** Proficiency in identifying, assessing, and mitigating risks associated with hybrid financing and sustainable development projects, ensuring project resilience and sustainability.
6. **Communication and Collaboration:** Excellent communication skills, both written and verbal, for conveying complex information clearly and collaborating effectively with stakeholders.
7. **Time Management:** Effective time management skills to meet the condensed timeline and deliverables as outlined in the Terms of Reference (ToR).

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

**Contract Price Structure:** The contract price will be a lump-sum payment, disbursed based on the completion of specified milestones. This structure ensures that payment aligns with the progress and delivery of tangible outcomes.

It's important to note that this project does not require travel; hence, travel-related expenses such as accommodation and per diems should not be included in the bid.

**Milestone Activities and Payment Schedule:** Payments will be made upon the achievement of specified milestones, with the corresponding percentage of the contract price allocated as follows:

1. **Literature Review Draft Submission (50% of Contract Price)**
  - Due on 19 January or an alternative date agreed and recorded by the SPC contact point.
  - Requires submission of a draft literature review.
2. **Findings Report Draft + Final Literature Review (20% of Contract Price)**
  - Due on 26 January or an alternative date agreed and recorded by the SPC contact point.
  - Submission of the draft findings report and the final literature review is required.
3. **Summary Report + Final Findings Report (30% of Contract Price)**
  - Due on 31 January or an alternative date agreed and recorded by the SPC contact point.
  - Requires submission of the summary report and final versions of all previous reports.

Prior to the release of each payment, the Consultant is required to submit the specified deliverable/s and submit an invoice from the Consultant to the SPC contact point. An email confirmation that the specific deliverable/s are accepted by the designated SPC contact are mandatory before payment may be made.

**General Payment Terms:** All payments shall be made in accordance with Article 10 of the SPC General Conditions. This provision ensures adherence to established guidelines and standard practices for contract executions within the SPC framework.

**Submission Requirements:** Bidders are requested to provide a breakdown of costs, a timeline outlining milestones to meet the final deadline, alongside their technical proposal, in accordance with the outlined cost components and payment schedule. This will facilitate an evaluation of the bid.

Milestone/deliverables	Deadline	% payment
Draft Literature Review Report	19 January 2024	50 %
Draft Findings Report + Final Literature Review Report	26 January 2024	20 %
Submission and acceptance by SPC of the Final Summary Report plus final versions of other two reports	31 January 2024	30 %
<b>TOTAL</b>		100 %

## G. Annexes to the Terms of Reference

Documents to be provided at commencement of contract

## 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 and financial requirements) which indicates the relative significance or weight of the items in the overall evaluation process.

Evaluation criteria	Score Weight (%)	Points obtainable
<b>Technical requirements (maximum 700 points)</b>		
10 years of work experience in international development finance, political economy, and policy analysis.	5 %	50
Demonstrated financial and policy research and analytical skills. Proposal to include case studies or other relevant information to support evidence-based decision-making and recommendations (previous relevant work).	20 %	200
Demonstrated political economy expertise (national and/or regional). Proposal to include case studies or other relevant information to support evidence-based decision-making and recommendations (previous relevant work).	20 %	200
Strong understanding of partner or donor requirements and procedures. Track record of successful partner engagement with traditional aid partners in the Pacific.	10 %	100
Professional experience on the ground in Pacific countries in financial governance or macro policy/strategy, ideally working with government agencies.	10 %	100
Quality of the proposal including writing style and ability to convey complex concepts in a clear, concise, and accessible manner.	5 %	50
<b>Financial Requirement (maximum 300 points)</b>		
Financial Proposal score = (Lowest Price / Price of the submitted offer) x 300	30 %	300
<b>TOTAL</b>	<b>100 %</b>	<b>1000</b>