

**GOVERNMENT OF SAINT LUCIA**  
**MSME LOAN-GRANT FACILITY PROJECT**  
**CONSULTANCY SERVICES FOR MARKETING AND DIGITALIZATION**  
**REQUEST FOR EXPRESSIONS OF INTEREST – FIRMS**

**The Government of Saint Lucia (GOSL)** has received financing from the Caribbean Development Bank (CDB) towards the cost of the MSME Loan-Grant Facility's Project Capacity Building -- Marketing and Digitalization and intends to apply a portion of the proceeds to eligible payments under this contract. Payment by CDB will be made only at the request of the (GOSL) and upon approval by CDB, and will be subject, in all respects, to the terms and conditions of the Loan Agreement. The Loan Agreement prohibits a withdrawal from the Loan Account for the purpose of any payment to persons or entities, or for any import of goods, if such payment or import, to the knowledge of CDB, is prohibited by a decision of the United Nations Security Council taken under Chapter VII of the Charter of the United Nations. No party other than (GOSL) shall derive any rights from the Loan Agreement or have any claim to the proceeds of the Loan.

**The Ministry of Commerce, Manufacturing, Business Development, Cooperatives and Consumer Affairs (MOC)** is the Executing Agency of this Project and now wishes to procure consultancy services for Marketing and Digitalization.

Saint Lucia's status as a Small Island Developing State (SIDS) faced with continuous endogenous and exogenous shocks, the GOSL further sees the need to build resilience within the sector, developing the capacity of MSMEs to respond to future events. In this regard, it was envisaged that the proposed financing of MSMEs must be accompanied by targeted technical support and capacity-building initiatives, aimed at formalising individual MSME operations mandate is to equip MSMEs with objectives of their business plan, in keeping with the broader scope of objectives under the MSME Loan-Grant Facility.

This capacity-building assignment will cover areas of support to include General Marketing, Creating Digital Presence and E-Commerce.

Further details can be found in the attached Terms of Reference. The duration of the assignment is expected to be for a period from **August 2024 to November 2024**, but not exceeding three staff months by key experts.

**The Ministry of Commerce, Manufacturing, Business Development, Cooperatives and Consumer Affairs (MOC)** now invites interested eligible consulting firms to submit Expressions of Interest (EOI) for the provision of these consultancy services.

Consultants shall be eligible to participate if:

- (a) in the case of a body corporate, it is legally incorporated or otherwise organised in an eligible country, has its principal place of business in an eligible country and is more than 50 per cent beneficially owned by citizen(s) and/or bona fide resident(s) of eligible country(ies) or by a body(ies) corporate meeting these requirements;
- (b) in the case of unincorporated firms, the persons are citizens or bona fide residents of an eligible country; and
- (c) in all cases, the consultant has no arrangement and undertakes not to make any arrangements, whereby any substantial part of the net profits or other tangible benefits of the contract will accrue or be paid to a person not a citizen or bona fide resident of an eligible country.

Eligible countries are member countries of CDB. Consultants are advised to review the detailed eligibility criteria detailed in Section 4 and conflict of interest provisions in Section 5 of the Procedures for Projects Financed by CDB (January, 2021) as applicable and as published on CDB's website.

In the assessment of submissions, consideration will be given to technical competence, qualifications and experience, local and regional experience on similar assignments, financial capability, and existing commitments. Key Experts will not be evaluated at the shortlisting stage.

Interested consultant teams are required to submit their Expression of Interest using the “**EOI Consulting Firms template**” attached to this REOI or downloaded from the Specific Procurement Notice on CDB's website.

All information must be submitted in **English**. Further information may be obtained from the first address below between 0900 hours and 1200 hours AST Monday to Friday.

Two (2) hard copies of the Expressions of Interest must be received at the first address below no later than **Tuesday, May 28<sup>th</sup>, 2024, 1000 hours AST** and one electronic copy must be sent simultaneously to CDB at the second email address below. The sealed envelope containing each submission should include the name and address of the applicant and shall be clearly marked “Expression of Interest – **Consultancy Services for Marketing and Digitalization**”. The selection method shall be Consultants' Qualifications Selection. Therefore, following the assessment of submissions, firms shall be assessed and compared, and the best qualified and experienced firm shall be selected. Only the selected firm shall be asked to submit a combined technical and financial proposal and, if such proposal is responsive and acceptable, be invited to

negotiate a contract. GOSL reserves the right to accept or reject late applications or to cancel the present invitation partially or in its entirety. It will not be bound to assign any reason for not selecting any applicant and will not defray any costs incurred by any applicant in the preparation and submission of Expressions of Interest.

<p>(1) Permanent Secretary</p> <p>Ministry of Commerce, Manufacturing, Business Development, Cooperatives and Consumer Affairs</p> <p>4th Floor Heraldine Rock Building The Waterfront Castries Saint Lucia, W.I. Tel: (758) 468-4203 Email: mincommerce@govt.lc</p>	<p>(2) Caribbean Development Bank Procurement Officer Email: procurement@caribank.org</p>
--	---



**GOVERNMENT OF SAINT LUCIA**

**Ministry of Commerce, Manufacturing, Business Development,**

**Cooperatives and Consumer Affairs**

**MSME Loan-Grant Facility**

**MSME Loan-Grant Facility's Project Capacity Building – Marketing and Digitalization**

**Terms of Reference – Marketing and Digitalization Training and Technical Assistance: 2024**

**1. BACKGROUND**

The COVID-19 pandemic has had a major impact on Saint Lucia's Micro, Small and Medium Enterprise (MSME) Sector, with existing enterprises reporting major reductions in sales revenue amidst increasing costs due to rising commodity prices and other disruptions in global value chains. This also coincides with a sharp increase in the number of MSME owners that were displaced by the economic downturn, establishing new MSMEs as a means of substituting lost income. Now in the third year of the pandemic, the Government of Saint Lucia (GOSL) seeks to support the post COVID-19 recovery efforts of the MSME sector by providing an influx of Capital to support individual MSME development objectives.

Moreover, given Saint Lucia's status as a Small Island Developing State (SIDS) faced with continuous endogenous and exogenous shocks, the GOSL further sees the need to build resilience within the sector, developing the capacity of MSMEs to respond to future events. In this regard, it was envisaged that the proposed financing of MSMEs must be accompanied by targeted technical support and capacity-building initiatives, aimed at formalizing individual MSME operations.

The Facility's main implementing Agency, i.e. the Ministry of Commerce, Manufacturing, Business Development, Cooperatives and Consumer Affairs - through its Small Business Development Centre (SBDC) Unit - seeks to engage firms to implement the project's training and technical assistance.

**2. SPECIFIC OBJECTIVES**

2.1. The Firm's mandate is to equip MSMEs with the necessary knowledge and skills to achieve the objectives of their business plan, in keeping with the broader scope of objectives under the MSME Loan-Grant Facility. This will include training and technical support in the following key areas:

- 2.1.1. **General Marketing** aims to study MSMEs' profiles and operations to better understand their marketing needs; and conduct marketing research to identify industry trends and commercial opportunities, for the development and implementation of an effective marketing strategy.
- 2.1.2. **Creating a Digital Presence** will help MSMEs with everything from brand creation and brand building to SEO, audience engagement, and social media empowerment.
- 2.1.3. **E-Commerce** aims to assist with connecting individual MSME businesses to the right customer base via electronic marketing platforms, help with the development of creative concepts, and execute engaging campaigns across various channels.

2.2. The specific focus would include but not be limited to the following:

- i. Marketing Segments and Targets
- ii. Analysing Buyer Behaviour
- iii. Dealing with the Competition
- iv. Marketing Research
- v. The Marketing Plan
- vi. Marketing Decision– Services & Pricing
- vii. Delivering Market Programmes– Products & Advertising
- viii. Developing Export Markets
- ix. Marketing Ethics
- x. Identify the opportunities in the digital economy ecosystem for emerging markets
- xi. Use techniques for customer segmentation in the digital ecosystem
- xii. Understand the options for digital payment solutions for MSMEs
- xiii. Know how to assess customer data to inform business decisions and product development
- xiv. Evaluate hardware, software and platforms for digital transformation

### 3. SCOPE

3.1. Between 150 to 250 MSMEs will benefit from training and between 100 to 150 MSMEs from mentorship and other technical assistance. The delivery of this component will include training MSMEs from at least five (5) locations around Saint Lucia, in batches of 15 to 25 MSMEs, covering each of the key areas. The technical assistance can be done using a method of the firm's choosing to be elaborated in the Expression of Interest, for 100 to 150 MSMEs, based on the needs of the specific MSMEs.

3.2. The Firms shall be responsible for developing the capacity of MSMEs through a variety of training or technical support formats including:

- In-Person training
- Virtual training
- Virtual consultancies
- Group Consultations
- One-on-One consultations
- Site Visits
- Field research
- Desk Research and Analysis

- Other singular or hybrid formats

3.3. The areas of training will be in keeping with those outlined in 3.1 above.

#### **4. ROLES AND RESPONSIBILITIES**

4.1. The Firm will undertake to perform these services with the highest standards of professional and ethical competence and integrity. The Firm is required to perform the following functions:

- a. Develop and implement the agenda for the training or consultations based on agreed Specific Objectives.
- b. Prepare training material for participants
- c. Provide access to training/consultancy material for distribution to participants and the Implementing Agency.
- d. Facilitate the training/technical support based on the agreed agenda, objectives and deliverables.
- e. Prepare a final report of the training/consultancy that includes:
  1. Evaluation of the MSMEs/businesses and deliverables
  2. Provision of recommendations
  3. Participants' assessment of training/consultation - MSME owners' feedback
- f. The Consultant may be required to attend meetings prior to and at the conclusion of the training/consultation to coordinate delivery as required by the Implementing Agency.

#### **5. QUALIFICATION:**

The selection of a firm to provide experts who serve as facilitators and consultants shall be based on their technical expertise in the identified subject matter, and/or previous experience working with MSMEs. The procedure for selecting firms shall be open and transparent and follow Procurement Procedures for Projects Financed by CDB (January, 2021). Selection shall be based on predetermined criteria and shall include the following:

##### **Firms Experience and Qualification:**

- a) At least Five (5) years of knowledge and experience specific to one or more of the industries or sectors under the project scope
- b) Experience working with MSMEs, specifically business training and consultation
- c) An understanding of the issues related to MSMEs in a developing country context, preferably in the Saint Lucian economy context.
- d) Excellent oral and written communication skills with fluency in written and spoken English. Knowledge and understanding of Saint Lucian Creole would be an asset.

##### **Agencies:**

- a) Reputable Agencies with a proven track record of training/consultation

- b) Onboarded Team of Professionals with relevant subject matter expertise

The firm or company shall ensure that additional experts if required, are adequately supported and equipped. In particular, the Consulting Firm shall ensure that there is sufficient administrative, secretarial and general support for each additional expert to enable the Firm's agent or Consultant to execute his/her/their primary responsibilities.

## **6. Duration of Contract**

Work is expected to **start by August 2024 and conclude by November 2024**, but not exceeding three-staff months.

## **7. Remuneration & Terms of Payment**

- a. The Implementing Agency shall pay to the firm, fees in keeping with going market rates and based on the format and duration of engagements as well as their qualifications and experience.
- b. The contract amount shall be paid to the firm in the following manner: after submission of the required deliverables and accompanied by original invoices to the Ministry of Commerce.
- c. The Ministry shall not enter into an employer/employee relationship with the Firm or its agents.

## **8. Office Accommodation**

No office accommodation at the Ministry of Commerce, Manufacturing, Business Development, Cooperatives and Consumer Affairs will be provided.

## **9. Reporting Requirements:**

- a. The Firm's Agent or Consultant will submit the following deliverables for Training:
  - i. A Final Training Report based on the approved methodology to be delivered within two (2) weeks following the close-off of the training component of the consultancy).
- b. The Firm's Agent or Consultant will submit the following deliverables for Technical Assistance:
  - i. Report 1: An Inception Report highlighting the findings and work plan of the key areas under the assignment to be delivered within ten (10) working days of signing the contract;
  - ii. Report 2: A First Draft of the Final Report based on the approved methodology to be delivered within three (3) months of the commencement of the technical assignment or after signing the contract, the greater of the two);
  - iii. Report 3: A Final Report based on the Terms of Reference, signed contract, and approved methodology. This report should be delivered within two (2) weeks after the close-off of the technical assignment on the signed the contract.

## 10. Submission, Approval & Termination of Reports

The deliverables referred to above must be submitted to the Permanent Secretary of the Ministry of Commerce, Manufacturing, Business Development, Cooperatives and Consumer Affairs and a copy to the Director, Small Enterprise Development Unit (SEDU), (also known as the Small Business Development Centre).

All deliverables must be submitted in **English**.

The Permanent Secretary of the Ministry of Commerce, Manufacturing, Business Development, Cooperatives and Consumer Affairs is responsible for approving the deliverables.

The Ministry of Commerce will provide feedback to the Consultant within five (5) business days of receipt of the final deliverable.

The Contract shall be terminated in accordance with the terms and conditions outlined in the Contractual arrangements with the Consultant and the Ministry of Commerce, Manufacturing, Business Development, Cooperatives and Consumer Affairs and in line with follow Procurement Procedures for Projects Financed by CDB (January, 2021).

**All work must be completed to the satisfaction of the Ministry of Commerce, Manufacturing, Business Development, Cooperatives and Consumer Affairs.**

## 11. Deliverables

Reporting Requirements for the Overall Consultancy:

For Training:

- a) A Report on overall training

For Technical Assistance

- a) Inception report
- b) First Draft of the Final Report
- c) Final Report

## 12. Financial arrangements

The total cost of the consultancy **will not exceed** the contract sum which should include professional fees, all travel fees (including local fees and allowances) and other expenses incurred by the



Consultant(s). After submission of the required deliverables in original and accompanied by original invoices to the Ministry of Commerce (the Implementing Agency).

### **13. Monitoring and Evaluation**

Performance on the project will be measured by the timely submission of the deliverables outlined in clause 9 and as outlined in the work plan submitted in the Inception Report. Feedback on each submitted deliverable is not a requirement for the continuation of the project. The Implementing Agency will provide feedback to the Consultant within five (5) working days of receipt of the final deliverable.

**Note:** All Firms from Member Countries on CDB's Eligibility Listing, as referenced in Annex 1 of Procurement Procedures for Projects Financed by CDB, (January 2021) are eligible to participate.