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**Project Title: Expert Deployment Mechanism for Trade and Development****A. AMENDMENT TO THE RFP**

- 1** In the Instructions to Bidders – Data Sheet, at Definitions (ee), DELETE the words “2016-02-24” and REPLACE them by “2016-03-09”.
- 2** In Section 4 of the RFP, Terms of Reference, Annex A, Project Description, under DFATD Technical Working Group, **DELETE**:  
“A DFATD Trade and Development Technical Working Group (TWG) will serve as the forum to assess, and approve or reject Mandates for the EDM.”  
and **REPLACE** by:  
“A DFATD Trade and Development Technical Working Group (TWG) will serve as the forum to decide on the policy relevance of proposed Mandates and recommend those for approval by the Technical Authority for the EDM.”  
In this section, also **DELETE**:  
“Once a proposal has been approved by the TWG, the Consultant will be given instruction to begin the deployment process.”  
and **REPLACE** by:  
“Once a proposal has been approved by the Technical Authority, the Consultant will be given instruction to begin the deployment process.”
- 3** In all sections of the English version of the RFP, **REPLACE** “Expert Deployment Mechanism” **WITH** “Expert Deployment Mechanism for Trade and Development”. The acronym for the project title, “EDM”, remains the same.
- 4** In Section 4 of the RFP, Terms of Reference, Annex B, Specific Mandate of the Consultant, **ADD** a 5<sup>th</sup> bullet in the sub-section “Identification and Deployment of Experts” of section 3.1, General Description, as follows:  
“The Consultant’s employees may not be nominated to carry out any of the technical assistance Mandates under EDM.”
- 5** In Section 5, Evaluation Criteria, of the RFP at Requirement 4, **REPLACE** the criterion B. i) in its entirety **BY** the revised criterion B. i) as follows:  
“ as head of organization or as a senior executive (such as chief executive officer, president, director general, partner) of a private enterprise, civil society organization or government institution during which time duties included representing the organization at international fora.”

**B. QUESTIONS AND ANSWERS**

- Question 1** Should bidders continue to reference DFATD, as utilized in the RFP, or Global Affairs Canada in their bids?
- Answer 1** Bidders should continue to refer to DFATD.
- Question 2** The TORs note that, among other things, the EDM “will work to improve the productive capacity of key sectors benefitting the poor, particularly the marginalized and women.” (p. 48). Given that this statement seems to greatly widen the scope of EDM interventions beyond its core mandate to help beneficiary countries finalize and implement trade and investment agreements with Canada, could GAC provide greater clarity on what it means

## Addendum 2

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by “improving the productive capacity of key sectors?”

**Answer 2** The focus of EDM activities is on supporting developing country partners to negotiate and implement trade and investment agreements with Canada, and adapt to and benefit from these agreements. In this context, the project would, among others, provide support to private sector groups within key sectors benefitting the poor, particularly the marginalized.

**Question 3** Is the selection of sectors under which technical assistance would be provided to a developing country linked with provisions in a relevant FTA and FIPA?

**Answer 3** In instances where FTAs or FIPAs are under negotiations or where negotiations have been concluded, the sectors under which EDM technical assistance would be provided must be directly affected by provisions within the relevant FTA or FIPA.

**Question 4** Is the EDM restricted to project implementation in Asia?

**Answer 4** No. The EDM is global in scope.

**Question 5** Has the Department considered the potential for a conflict of interest in the provision of technical assistance? For example, if a technical expert encourages the country to further negotiate a FTA/FIPA and to try to achieve a better outcome for a negotiated agreement. Who is the ultimate client, the Government of Canada or stakeholders in developing countries?

**Answer 5** The Department considers it to be in Canada’s best interests to increase the capacity of developing countries to negotiate, implement, adapt to and benefit from FTAs and FIPAs with Canada.

**Question 6** Does the provision of assistance in FTA/FIPA negotiations with Canada include multilateral negotiations involving Canada?

**Answer 6** The EDM has been designed to support developing countries or groups of countries with which Canada is negotiating bilateral or regional trade agreements.

**Question 7** Some existing projects funded through the Government of Canada are already providing support in many of the same countries that the EDM could be deployed in, with a potential for overlap. Will countries with existing support or financing be eligible for further support through the EDM?

**Answer 7** Yes, countries with existing support or financing from DFATD bilateral programs or from other Government of Canada departments are eligible for support through the EDM. Where relevant, the executing agency should ensure that activities funded under EDM complement those undertaken by the Government of Canada or other development actors.

**Question 8** What is the role of the executing agency in creating demand for or promoting use of the EDM?

- Answer 8** It is specified in p. 51 of the RFP that DFATD will be “responsible for promoting the EDM within the Department, with recipient governments, and more broadly in negotiating partner countries.” The executing agency may, solely upon the request/approval of the DFATD Technical Authority, engage in EDM information sharing activities on an “as needed” basis. An example could be to deliver an information session on project objectives to interested applicants.
- Question 9** Is a secret security clearance required for all sub-contractors?
- Answer 9** It is anticipated that some deployments will require sub-contractors (i.e. experts) to access Protected A/CONFIDENTIAL or Protected B/SECRET documents. In such cases, sub-contractors recruited by the executing agency would need to possess a valid “Confidential” or “Secret” security clearance. Security requirements will be communicated to the executing agency by the Technical Authority at the time of the approval of Mandates.
- Question 10** Can lessons learned (e.g. evaluation reports) from prior EDM-like project be made available to the CEA?
- Answer 10** The Bidders are encouraged to review publicly-available literature on best practices and lessons learned in the context of the responsive delivery of technical assistance in developing countries. The Bidders’ Technical Proposal will be evaluated, in part, on their experience in implementing responsive expert deployment mechanisms similar in design to the EDM. Bidders are therefore also encouraged to draw from their experience and lessons learned in implementing such projects.
- Question 11** If a country starts negotiating an FTA or FIPA with Canada after the start of the project, are these countries eligible for technical assistance funding?
- Answer 11** Yes. The basic condition for EDM engagement is that an FTA or FIPA is either under negotiation (or exploratory talks are underway), concluded, ratified, or in-force between Canada and a developing country or group of countries eligible for official development assistance.
- Question 12** After the needs assessment plans are completed for the various countries, can this document be revisited to include additional requests or mandates from the countries during the implementation period of the project?
- Answer 12** Yes. As specified in Annex A of the RFP, needs assessment plans are intended to be dynamic working documents.
- Question 13** Form FIN-3 Reimbursable Expenses under guidance to bidders states: The Bidder is requested to indicate his overall estimate for his reimbursable expenses to operationalize the contract. The breakdown of the cost line items will be refined by the winning Bidder following award of the contract. The Bidder is not to include any fees, cost of contractor(s) (including contractors’ reimbursable expenses) or overhead in the reimbursable expenses (except for Local Support Staff). The Bidder is requested to include a provision for inflation, if any, in the total cost.
- Does the \$3,000,000 for cost of reimbursable expenses for mandates included as #D on

FORM FIN-3 included in the total reimbursable expenses, and if so should it be considered separate from the bidder's expenses, which would be funds outside of the cost of reimbursable expenses for the mandates, such as the travel and living, communication costs and translation, etc.?

**Answer 13** The \$3,000,000 set aside for the reimbursable expenses for the mandates is meant to cover the reimbursable expenses of the Technical Advisors engaged to carry out the mandates. It should be considered separate of the bidder's expenses.

**Question 14** Req. 1, Clause A. ii) on page 70 of the RFP - c. Location: Experience in at least one of the following. Full points for all three locations...

Question: Is my interpretation correct that a project located in only one "type of country" will score 1 point; a project located in two "types of countries" will score 2 points; and a project covering all 3 "types of countries" will score 3 points? Or can "all three locations" be interpreted to mean 3 of the same "type of country" (i.e. 3 developing countries; 3 countries in transition; or 3 failed and fragile states)?

**Answer 14** A project located in only one *type* of country – that is, *either* in developing countries (other than countries in transition and failed and fragile states), countries in transition, or failed and fragile states – will score 1 point; a project located in two types of countries will score 2 points; and a project covering all 3 types of countries will score 3 points. For example, a project that worked in the Philippines and Indonesia would score 1 point because the two countries are developing countries but neither is in transition or failed and fragile.

**Question 15** Req. 4, Clause B. i) on page 74 of the RFP – The proposed individual should have at least 36 months of experience in: i) representing, as head of organization or as a senior executive....at international fora.

Question: I have failed to find a definition of "international fora" in the RFP; presumably this means making speeches, presentations, etc. at conferences and the like – activities which are generally of 1-3 days' duration, thus making it nearly impossible to accumulate 36 months of experience in an entire lifetime. If our proposed individual has 15 years of work experience, should we interpret the specified "36 months" criteria literally (i.e. indicate the no. of days/weeks for each activity/conference), or pick a 36-month window and write to that? Would you also kindly define the types of "international fora" referred to?

**Answer 15** Req. 4, Clause B. i) on page 74 of the RFP should be read as follows:  
"The proposed individual should have at least 36 months experience as head of organization or as a senior executive (such as chief executive officer, president, director general, partner) of a private enterprise, civil society organization or government institution *during which time duties included representing the organization* at international fora."

"International fora" is used in a broad sense and means any meeting, conference,

gathering, etc. at the international level.

## **C. BIDDERS CONFERENCE MINUTES AND OTHERS**

- 6** Presentation of the EDM project by the Project Team Leader – Annex A – PowerPoint presentation (attach.)

The basic condition for EDM engagement is that a Free Trade Agreement or Foreign Investment Promotion and Protection Agreement is either under negotiation (or exploratory talks are underway), concluded, ratified, or has recently been brought into force between Canada and a developing country or group of countries eligible for official development assistance. The Executing Agency's implementation approach for EDM should be flexible and able to respond to requests for technical assistance made during any phase of this process.

The core delivery approach for the EDM is the recruitment and deployment of Canadian technical experts. These deployments are situated within broader Mandates (single or clusters of individual deployments) and ideally within broader needs assessment plans.

In consultation with the DFATD Technical Working Group, the DFATD Technical Authority will direct the Executing Agency to draft needs assessment plans, which should include notional Mandates, deployment plans and budgetary estimates. These needs assessment plans are developed by the Executing Agency in consultation with other stakeholders, such as Canadian negotiators, partner country governments and other non-government actors and donors, and recommended by the DFATD Technical Working Group and approved by the DFATD Technical Authority.

Requests for technical assistance will reflect needs expressed either by partner country governments, local civil society or local private sector groups. The DFATD Technical Authority, in consultation with the Technical Working Group, approves Mandates.

The review of proposed Mandates by the DFATD Technical Working Group is a dynamic process which may involve consultations between the Technical Working Group, the Technical Authority and the Executing Agency to review and refine proposed mandates in consultation with the requestor.

Once proposed Mandates are approved by the Technical Authority, the Executing Agency will be directed to recruit and deploy technical experts to deliver on the approved Mandates. The Executing Agency is expected to manage multiple active mandates at a time.

## **D. All other terms and conditions remain unchanged.**