Terms of Reference

Technical Assistance for the Development of a Regional Sex-Disaggregated Socio-Economic Data Collection Framework and Monitoring & Evaluation Tracking Tool for Renewable Energy Transition in Caribbean Fisheries and Aquaculture

1.0 Background and Justification

The fisheries and aquaculture sectors play a critical role in supporting livelihoods, employment, food security, and socio-economic development across the Caribbean. Women and men contribute throughout fisheries and aquaculture value chains, including harvesting, processing, marketing, distribution, and fisheries governance. Despite the importance of these sectors, there remain significant gaps in the availability, quality, consistency, and use of sex-disaggregated socio-economic data to support evidence-based decision-making and policy development. Existing fisheries information systems have traditionally focused on biological and production-related data, with limited attention given to socio-economic indicators, labour participation, fisheries asset ownership, gender roles, youth engagement, and broader development outcomes.

At the same time, Caribbean fisheries and aquaculture sectors are increasingly affected by climate change, rising operational costs, and energy insecurity associated with dependence on fossil fuels. Through the STAR-Fish Project, participating countries are pursuing the adoption of renewable energy and low-carbon technologies to strengthen the resilience and sustainability of fisheries and aquaculture systems. However, there is currently limited regional capacity to systematically monitor and assess the socio-economic impacts of renewable energy transition initiatives, including implications for women, youth, employment, decent work, and participation in fisheries governance processes.

Strengthening regional systems for sex-disaggregated socio-economic data collection and monitoring is therefore essential to support inclusive governance, evidence-based policy development, and effective monitoring of renewable energy transition interventions within fisheries and aquaculture sectors. There is also a need to strengthen regional harmonization of indicators, methodologies, reporting systems, and monitoring approaches to improve comparability and consistency of socio-economic data across participating countries. The development of a regional guiding framework and practical monitoring tools will support Member States in collecting, analyzing, and reporting data related to gender-responsive renewable energy transition and sustainable fisheries development.

The Caribbean Regional Fisheries Mechanism (CRFM), established in 2003 as an institution of the Caribbean Community (CARICOM), promotes and facilitates the conservation, management, and responsible utilization of fisheries and other living marine and aquatic resources for the economic and social benefit of the people of the Community. The CRFM is currently implementing the STAR-Fish – Sustainable Technologies for Adaptation and Resilience in Fisheries (STAR-Fish) Project, funded by Global

Affairs Canada (GAC)[1], which aims to strengthen the resilience of Caribbean fisheries and aquaculture sectors by promoting clean energy transition while advancing gender-responsive governance arrangements for the adoption of renewable energy solutions and technologies. The project is being implemented in the eight (8) participating countries of Belize, Dominica, Grenada, Guyana, Jamaica, Saint Lucia, Saint Vincent and the Grenadines, and Suriname.

2.0 Objectives of the Consultancy

The overall objective of the consultancy is to develop a regional approach for the collection, analysis, and use of sex-disaggregated socio-economic data related to renewable energy transition within Caribbean fisheries and aquaculture sectors through the development of:

a. A Regional Sex-Disaggregated Socio-Economic Data Collection Framework; and
b. A Regional Monitoring and Evaluation (M&E) Tracking Framework and Prototype Tool to support the monitoring and reporting of renewable energy transition outcomes, including gender, youth, labour participation, and decent work considerations.

3.0 Scope of Works

Under the direction of the STAR-Fish Project Coordinator and in collaboration with the CRFM Project Management Unit (PMU), National Project Focal Points, National Gender Focal Points, and relevant regional stakeholders, the Consultant shall undertake the following tasks:

3.1 Inception and Work Planning

- Participate in an inception meeting with the CRFM/PMU to review the Terms of Reference, project implementation, methodologies, and confirm timelines and reporting requirements;
- Prepare an Inception Report and detailed Work Plan and implementation schedule;

The methodology and all activities and outputs under the assignment shall apply a gender-responsive, socially inclusive, and ESS-informed approach consistent with the STAR-Fish Gender Equality Strategy (GES), the CRFM Environmental and Social Safeguards (ESS) Policy, Global Affairs Canada (GAC) ESS Guidelines, and relevant national and regional fisheries, energy, climate, and sustainable development policies. This shall include consideration of implications for women, youth, Indigenous Peoples, and vulnerable fisheries stakeholders; barriers to equitable access to financing, technology, infrastructure, and

[1] The Global Affairs Canada (GAC), under the leadership of the Minister of Foreign Affairs; the Minister of Export Promotion, International Trade and Economic Development; and the Minister of International Development, is responsible for advancing Canada's international relations, including, inter alia: Developing and implementing foreign policy; Fostering the development of international law, international trade and commerce; Providing international assistance (encompassing humanitarian, development, and peace and security.

participation in transition processes; and potential environmental and social risks associated with identified transition pathways.

3.2 Regional Review and Assessment of Existing Data Systems and Monitoring Approaches

A core task of this consultancy is to undertake a regional assessment of existing fisheries and aquaculture socio-economic data collection systems, indicators, methodologies, institutional arrangements, and monitoring approaches relevant to renewable energy transition within participating countries.

The assessment shall:

- review existing fisheries and aquaculture socio-economic data collection systems, indicators, methodologies, reporting arrangements and institutional responsibilities;
- assess the availability and use of sex-disaggregated data related to fisheries and aquaculture employment, labour participation, asset ownership, value chain participation, and fisheries governance;
- identify data gaps, inconsistencies, constraints, and opportunities affecting data collection, analysis, reporting, accessibility, and use;
- assess existing monitoring approaches for gender, youth, decent work, and other socio-economic indicators, and their capacity to support future monitoring of renewable energy transition outcomes within fisheries and aquaculture sectors;
- identify opportunities for regional harmonization and standardization of indicators, methodologies, and reporting approaches; and
- review relevant regional and international frameworks, methodologies, and best practices applicable to fisheries socio-economic monitoring and gender-responsive data systems, to inform the development of the Regional Sex-Disaggregated Socio-Economic Data Collection Framework and M&E Tracking Tool.

3.3 Development of Regional Guiding Framework for Sex-Disaggregated Socio-Economic Data Collection

Based on the findings of the regional assessment, the Consultant shall develop a Regional Sex-Disaggregated Socio-Economic Data Collection Framework to support the collection, analysis, and reporting of socio-economic data associated with the renewable energy transition for the fisheries and aquaculture sector within the Caribbean.

The Framework shall:

- identify and define a recommended set of regional socio-economic, gender-responsive, youth, and decent work indicators relevant to fisheries and aquaculture sectors;
- establish baseline data requirements necessary to assess the socio-economic impacts of renewable energy and low-carbon interventions;
- provide guidance for the collection, analysis, reporting, and use of sex-disaggregated socio-economic data related to the renewable energy transition;

- include indicator definitions, metadata, and recommended methodologies for data collection and reporting;
- provide guidance for monitoring fisheries asset ownership and access, labour participation, value chain roles, energy use, and fisheries governance decision-making processes associated with renewable energy transition initiative;
- recommend approaches for improving data quality, consistency, accessibility, and reporting across participating countries;
- identify institutional roles, responsibilities, and reporting arrangements to support implementation;
- incorporate data management and reporting principles that promote the Findability, Accessibility, Interoperability, and Reusability (FAIR) of socio-economic data, while respecting applicable data protection, privacy, confidentiality, and national data governance requirements; and
- provide recommendations for regional harmonization and integration with existing national and regional fisheries information systems, where feasible.

The Framework shall align with relevant regional fisheries, gender, labour, energy, climate, and sustainable development policies, as well as STAR-Fish monitoring and reporting requirements. The Framework should be practical, adaptable, and capable of supporting implementation within the institutional capacities of participating countries. To the extent feasible, the Framework shall promote the application of FAIR Data Principles to support data consistency, accessibility, interoperability, and long-term use across participating countries and institutions.

3.4 Development of Regional Monitoring and Evaluation (M&E) Tracking Framework and Prototype Tool

Building on the Regional Sex-Disaggregated Socio-Economic Data Collection Framework, the Consultant shall develop a Regional Monitoring and Evaluation (M&E) Tracking Framework and Prototype Tool to support the monitoring, analysis, reporting, and assessment of renewable energy transition outcomes within fisheries and aquaculture sectors.

The Framework and Prototype Tool shall:

- establish a results-based approach for monitoring renewable energy and low-carbon transition initiatives within fisheries and aquaculture sectors;
- provide a structured mechanism for tracking socio-economic, gender, youth, labour, decent work, and governance-related outcomes associated with renewable energy transition interventions;
- facilitate the collection, aggregation, analysis, visualization, and reporting of data across participating countries;
- support standardized and comparable reporting at national and regional levels;
- incorporate indicator tracking matrices, reporting templates, metadata sheets, and data management protocols consistent with the Regional Sex-Disaggregated Socio-Economic Data Collection Framework;

- facilitate the management and reporting of data in a manner consistent with FAIR Data Principles, while respecting applicable data governance, privacy, and confidentiality requirements;
- support evidence-based decision-making, adaptive management, and reporting on renewable energy transition outcomes; and
- provide recommendations for institutional implementation, maintenance, and future enhancement of the Framework and Prototype Tool.

The Prototype Tool may include, but is not limited to:

- indicator tracking matrices;
- reporting templates and metadata sheets;
- spreadsheet-based monitoring tools;
- dashboard-enabled reporting structures; and
- prototype visualization and reporting functionalities.

The Consultant shall also develop:

- user guidance documentation;
- recommended reporting protocols;
- recommendations for institutional implementation and maintenance; and
- recommendations for future scaling and enhancement of the Framework and Prototype Tool.

The assignment is intended to support the development of a practical monitoring and reporting framework and prototype tracking tool and does not include development of a fully operational software platform or enterprise information management system.

3.5 Stakeholder Engagement and Regional Consultations

The Consultant shall engage relevant stakeholders to support information gathering, validate findings, and strengthen ownership of the assessment process. Stakeholders may include, but are not limited to:

- National Project Focal Points;
- National Gender Focal Points;
- Fisheries Authorities;
- National Statistics Offices;
- Labour and Gender Agencies;
- Energy Authorities;
- fisherfolk organizations and cooperatives;
- women and youth fisheries groups;
- regional organizations and development partners; and
- other relevant technical stakeholders.

The Consultant shall work closely with National Project Focal Points, National Gender Focal Points, and relevant regional agencies to support information gathering, stakeholder consultations, and validation of the proposed Framework and Prototype Tool. Stakeholder engagement processes shall apply participatory and inclusive approaches, ensure meaningful participation of women and youth, integrate Environmental and Social Safeguards (ESS) considerations, and document stakeholder perspectives on existing data systems, monitoring needs, implementation challenges, and opportunities for strengthening regional socio-economic data collection and reporting.

The Consultant shall propose and implement an appropriate consultation approach utilizing a combination of desk reviews, virtual consultations, stakeholder interviews, regional coordination meetings, and targeted in-country engagement, as appropriate and agreed with the CRFM/PMU.

The Consultant shall organize and facilitate one (1) virtual regional validation workshop involving participating countries and relevant stakeholders to review and validate the assessment findings, proposed indicators, data collection framework, M&E tracking framework, and prototype tool. The workshop may be conducted through virtual, hybrid, or in-person modalities, as agreed with the CRFM/PMU. The Consultant shall prepare workshop materials and presentations and submit a summary report documenting stakeholder participation, discussions, recommendations, and validation outcomes.

3.6 Finalization of Outputs and Final Technical Report

Following stakeholder consultations and the regional validation process, the Consultant shall:

- submit finalized versions of the Regional Sex-Disaggregated Socio-Economic Data Collection Framework and the Regional M&E Tracking Framework and Prototype Tool, including all supporting guidance materials, templates, metadata sheets, incorporating stakeholder feedback and recommendations; and
- prepare and submit a consolidated Final Technical Report summarizing the methodology, assessment findings, consultation outcomes, validation results, implementation recommendations, lessons learned, and final outputs.

4.0 Expected Outcomes and Deliverables

Deliverable 1: Inception Report and Work Plan

Deliverable 2: Regional Assessment Report and Draft Regional Sex-Disaggregated Socio-Economic Data Collection Framework

Deliverable 3: Draft Regional Monitoring and Evaluation (M&E) Tracking Framework and Prototype Tool, Regional Validation Workshop, and Final Framework and Prototype Tool

Deliverable 4: Final Technical Report

5.0 Project Schedule and Milestones

Deliverable	Due Date	% Payment
Deliverable 1: Inception Report and Work Plan	Month 1	20%
Deliverable 2: Regional Assessment Report and Draft Regional Sex-Disaggregated Socio-Economic Data Collection Framework	Month 3	40%
Deliverable 3: Draft Regional Monitoring and Evaluation (M&E) Tracking Framework and Prototype Tool, Regional Validation Workshop, and Final Framework and Prototype Tool	Month 5	30%
Deliverable 4: Final Technical Report	Month 6	10%

6.0 Reporting Requirements

The Consultant shall report directly to the STAR-Fish Regional Project Coordinator and work closely with the CRFM Project Management Unit (PMU), including the ESS Specialist, throughout implementation. In accordance with the schedule established in Section 5 of these Terms of Reference, all deliverables shall be submitted in English and in electronic format, including reports in editable Microsoft Word format, presentations, supporting datasets and analytical materials, tools and templates used in the feasibility assessment, and relevant reference materials.

Where Artificial Intelligence (AI) tools are used in the preparation of outputs, the Consultant shall acknowledge such use, verify the accuracy and appropriateness of AI-generated content, and retain full professional responsibility for all deliverables. All outputs produced under the assignment shall become the sole property of the CRFM, which shall retain exclusive rights related to their use, reproduction, dissemination, and publication.

7.0 Acceptance Criteria

Payments will be authorized once the CRFM accepts the deliverables specified by the TOR. The CRFM will have up to three weeks to provide written comments/recommendations to the consultant(s) reports. Unless previously determined, the CRFM will generally accept the deliverables once the consultant or consulting firm confirms the following: (i) receipt and additional inclusion of comments/recommendations in a revised version and (ii) provision of the date for presentation of the revised versions of the submitted deliverables. The consultant(s) are expected to include these comments.

8.0 Consultant Efforts and Required Skills

The assignment may be undertaken by a firm or consortium with demonstrated expertise in fisheries socio-economic monitoring, gender-responsive data systems, monitoring and evaluation (M&E), fisheries governance, institutional strengthening, and strategic planning within the Caribbean region.

The proposed team should collectively possess qualifications and experience in the following areas, as relevant to the scope of the assignment:

Socio-Economic Data and Monitoring Specialist (Team Lead)

- Advanced qualifications in fisheries socio-economics, statistics, economics, monitoring and evaluation, social sciences, sustainable development, or related disciplines;
- At least seven (7) years of professional experience in socio-economic assessments, data collection systems, indicator development, monitoring frameworks, or related assignments;
- Experience developing data collection frameworks, indicators, metadata, reporting systems, or monitoring tools;
- Demonstrated knowledge of fisheries and aquaculture governance systems and institutional arrangements within the Caribbean region; and
- Experience undertaking regional or multi-country assignments involving data collection, policy analysis, institutional assessments, or framework development.

Monitoring and Evaluation Specialist

- Advanced qualifications in monitoring and evaluation, statistics, information management, economics, Qualifications in monitoring and evaluation, statistics, information management, economics, public policy, development studies, or related disciplines;
- At least five (5) years of experience developing monitoring and evaluation frameworks, reporting systems, indicator tracking tools, or institutional reporting mechanisms;
- Experience supporting harmonized monitoring and reporting approaches across multiple countries or institutions; and
- Experience developing practical monitoring, reporting, visualization, or prototype tracking tools.

General Requirements

The proposed team should also demonstrate:

- experience working in the Caribbean region;
- familiarity with gender-responsive and socially inclusive data collection and monitoring approaches;
- understanding of Environmental and Social Safeguards (ESS) considerations relevant to fisheries and coastal communities;

- experience working with government agencies, National Statistics Offices, fisherfolk organizations, and regional institutions;
- strong communication, facilitation, analytical, and technical writing skills; and
- ability to deliver high-quality technical outputs within agreed timelines.

9.0 Application and Selection Procedure

Interested consulting firms are invited to submit their Proposal outlining observations on these Terms of Reference, understanding of the objectives of the assignment, details of methodology to be applied, proposed work plan and timeline, personnel to be involved, skills and Curriculum Vitae of all proposed team members, declaration of availability, declaration of no conflict of interest, and tax inclusive price proposal and all other associated costs.

Proposals will be evaluated using a Quality and Cost-Based Selection procedure, in which the Technical Proposal can be awarded a maximum of 70% of the evaluation score and price a maximum of 30% of the evaluation score.

10.0 Duration

The consultancy shall be undertaken over a period of six (6) months from the date of contract signature.

11.0 Cost of the Consultancy

The budget included in this section details the level of effort estimated for the activities programmed in this consultancy.

Table 1 – Consultancy Budget (CAD)

CONCEPT	**Months (estimated)**	**(USD)**
Consulting Fees	6	$52,500
Reimbursable Expenses (Travel and other costs)	6	$47,722
Total		$97,222