

Expression of Interest
Universal Service Fund



Terms of Reference

for

**Consultancy Service for the development and
implementation of a loan/equity programme**

Terms of Reference

Consultancy Service for the development and implementation of a loan/equity programme for the Universal Service Fund.

Background/Company Profile:

The Universal Service Fund is a Statutory Body established under the Telecommunications (Amendment) Act 2012. The organization came into being on June 1, 2012 as a successor to the Universal Access Fund Company Limited (UAF), which was a wholly-owned government limited liability company incorporated on 18 May 2005, with the majority of the shares held by the Spectrum Management Authority, and the Permanent Secretary of the Portfolio Ministry being the minority shareholder.

The Telecommunication Act (2000) mandates that all telecommunications licences granted by the Minister are subject to an undertaking by the Licencee to:

“...comply with the provisions of the Act, relating to the type of specific service to which the licence relates, including...universal service obligations...”¹

In April 2005, the then Ministry of Commerce, Science and Technology (with Energy) issued an order mandating that, effective 1 June, 2005, all domestic telecommunications carriers were obliged to collect a universal service charge on all inbound international voice telephony calls terminated to fixed line telephones (US\$0.03 per minute) and to mobile phones (US\$0.02 per minute). The UAF was incorporated and charged with the management and administration of the funds derived from this funding regime designed expressly to fulfill the government’s Universal Service Obligations which were defined to mean the provision of broadband access to the Internet for all Jamaican residents.

Consequently, the Universal Service Fund (USF) was established to take over the operations of the UAF. The mandate of the USF was widened to incorporate the mandate of the former UAF and to provide funding to a wider project range, including the “provision of loans and grants for Information and Communication Technology projects”.

The offices of the USF are located on the 4th Floor of the Petroleum Corporation of Jamaica Building at 36 Trafalgar Road, Kingston 10 and the Consultancy shall be conducted at the said location.

The Organization's main responsibilities include:

- ☑ *The collection of Universal Telecommunication Service Levy from all international voice service providers operating in Jamaica*
- ☑ *Disbursement of funds for the implementation of approved projects.*
- ☑ *Monitoring the implementation of projects.*
- ☑ *Accounting for funds collected and disbursed.*

Objectives:

The Universal Service Fund's vision is to enable a knowledge-based society with universal access to the Internet and digital inclusion, thereby fueling rapid socio-economic growth and development for Jamaica.

Further to The Telecommunications Act - Section 42A. (a) one of the areas that the Universal service levy is to be used is as follows:

“The provision of loans or grants for information and communications technology projects operated by local non-profit organisations and loans, grants or equity investment for information and communications technology projects operated by local micro, small and medium size businesses (excluding domestic network operators) for the purpose of stimulating the expansion of information and communications technology access.”

In fulfillment of this obligation, the USF wishes to contract a Consultant to develop and execute this loan/equity programme.

Scope of Service:

The Consultant is required to develop the framework and implement the loan/equity fund programme to include;

- determining the feasibility of the programme
- determining the suitable type loan fund
- determining the suitable type equity investment
- defining criteria for accessing fund
- procedure for processing of application
- identifying human resource needed to manage the process
- identify tools and applications needed to implement programme
- manage procurement of necessary support services utilizing GOJ Procurement Guidelines
- implementation of programme
- Monitoring and evaluation
- Ensure compliance with applicable GOJ Financial Services Regulations
- Any other applicable requirement

Training:

Training of USF staff in application processing, use of applicable software and systems.

Reports and Time Schedule:

1. Inception Report - Results of Feasibility Study and Project design - 4 weeks after contract commencement
2. Interim Report # 1- Project Execution - 8 weeks after contract commencement
3. Interim Report # 2 - Project Monitoring and Evaluation -12 weeks after contract commencement
4. Final Report - 16 weeks after contract commencement

Facilities to be provided by Procuring Entity

- Access to required data upon Consultant's request
- Access to USF personnel as needed

Methodology:

The exercise to be undertaken by the Consultant will be informed by the Terms of Reference and will require the development of a detailed methodology and work plan indicating how the objectives of the assignment will be achieved and the support required from the USF.

Qualifications & Skills:

A minimum of a Bachelor's degree in Finance, Accounting, Economics or related degree;

Certification in Banking and Finance;

Full computer literacy in Microsoft Office Package Suite and in the use of web browser capability;

Strong interpersonal skills- including but not limited to the ability to work under pressure with restrictive timelines and to establish and maintain effective working relationships with people;

Capacity to organize and facilitate senior level consultative meetings;

Excellent oral and written communication skills in English

Professional Experience:

At least ten (10) years experience in the banking and finance industry;

At least five (5) years of related consultancy experience;

Experience in Project Management as demonstrated in previous assignments.

Standard Form (Appendix A)

CURRICULUM VITAE (CV) FOR CONSULTANT

1. **Proposed Position** *[only one candidate shall be nominated for each position]:* _____

2. **Name of Firm** *[Insert name of firm proposing the staff]:* _____

3. **Name of Staff** *[Insert full name]:* _____

4. **Date of Birth:** _____ **Nationality:** _____

5. **Education** *[Indicate college/university and other specialized education of staff member, giving names of institutions, degrees obtained, and dates of obtainment]:* _____

6. **Membership of Professional Associations:** _____

7. **Other Training** *[Indicate significant training since degrees under 5 - Education were obtained]:* _____

8. **Countries of Work Experience:** *[List countries where staff has worked in the last ten years]:* _____

9. **Languages** *[For each language indicate proficiency: good, fair, or poor in speaking, reading, and writing]:* _____

10. Employment Record

[Starting with present position, list in reverse order every employment held by staff member since graduation, giving for each employment (see format here below): dates of employment, name of employing organization, positions held.]

From [Year]: __ To [Year]: _____

Employer: _____

Positions held: _____

<p>11. Detailed Tasks Assigned</p> <p><i>[List all tasks to be performed under this assignment]</i></p>	<p>12. Work Undertaken that Best Illustrates Capability to Handle the Tasks Assigned <i>[Among the assignments in which the staff has been involved, indicate the following information for those assignments that best illustrate staff capability to handle the tasks listed under point 11.]</i></p> <p>Name of assignment or project: _____</p> <p>Year: _____</p> <p>Location: _____</p> <p>Procuring Entity: _____</p> <p>Main project features: _____</p> <p>Positions held: _____</p> <p>Activities performed: _____</p>
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13. Certification:

I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes myself, my qualifications, and my experience. I understand that any wilful misstatement described herein may lead to my disqualification or dismissal, if engaged.

_____ Date: _____
[Signature of staff member or authorized representative of the staff] Day/Month/Year

Full name of authorized representative: _____

Submission Letter (Appendix B)

[Address]

To: [Name and Address of USF]

Dear Chief Executive Officer:

I, the undersigned, offer to provide the consulting services for [Insert title of assignment] in accordance with your advertisement dated [Insert Date] and my submission.

I am hereby submitting my Expression of Interest. I hereby declare that all the information and statements made in this Expression of Interest are true and accept that any misrepresentations contained in it may lead to my disqualification.

I undertake, if my Expression of Interest is accepted, to initiate the consulting services related to the assignment not later than the date indicated in the Terms of Reference.

Yours sincerely,

Signature [In full and initials]: _____

Name of Individual: _____