

Call for Proposal / Request for Quote

**Date: 26 March 2025**

## **TERMS OF REFERENCE (ToR) Empanelment of an Expat Management Agency(s)**

### **1. Background**

The Coalition for Disaster Resilient Infrastructure (CDRI) is a multi-stakeholder global partnership of national governments, UN agencies and programmes, multilateral development banks and financing mechanisms, the private sector, and academic and knowledge institutions that aims to promote the resilience of new and existing infrastructure systems to climate and disaster risks in support of sustainable development. The vision, mission, goal, and objectives of CDRI are explicitly linked to the post-2015 development agendas. CDRI promotes its Disaster Resilient Infrastructure (DRI) mandate through knowledge exchange and bolstering technical capacities among member countries and partners through the following key Strategic Priorities:

- Advocacy and Partnerships
- Research, Knowledge Management, and Capacity Building
- Program Support and Technical Assistance

### **2. Strategic Work Plan 2023-26 (SWP)**

Following the completion of the CDRI's Work Plan 2020-2022, CDRI conducted a thorough multi-stakeholder review to gather lessons from the implementation of the previous work plan and to shape a vision in response to emerging issues related to infrastructure resilience. The SWP 2023-2026 was approved in March 2023.

CDRI's Strategic Work Plan 2023-26 describes the broad contours of its priority actions and planned initiatives in the coming years. Initiatives include work across Transport, Telecom, Power, Health, and Urban Development, whilst ensuring technical standards and capacity development. In the next two years, the Coalition will continue to leverage the expertise of its Member Countries and partners to develop context-specific, innovative solutions for resilient infrastructure towards the achievement of national priorities and global commitments of its members.

Within the Strategic Work Plan for 2023 – 2026, CDRI has set out three strategic outcomes:

- Strategic Outcome 1: A strong Coalition that has the membership, resources, and global leadership to drive global, national, regional, and local DRI action.
- Strategic Outcome 2: Global DRI research, Coalition-led peer engagement, and CDRI-curated and generated knowledge promote risk-informed policy and practice.
- Strategic Outcome 3: Enhanced capacities of government, private enterprises, and communities to implement post-disaster recovery and DRI action at scale.

Additionally, the SWP also provides a framework for the Coalition members and partners to collaborate, cooperate and advocate for meeting global goals and targets related to DRI. It also

illustrates how the Coalition's interventions align to produce results or outcomes that support the achievement of the intended impact.

The Strategic Outcomes (SOs) embedded in the SWP are interdependent and mutually reinforcing. Each SO includes a set of intermediate outcomes envisioned as building blocks for achieving the higher-order strategic outcome or result.

### **3. Objective:**

The purpose of this Terms of Reference (ToR) is to engage professional agency(s) to provide comprehensive expat management services, ensuring seamless relocation, settlement, and continued support for expatriate employees, facilitating their smooth transition into the host country throughout the assignment period.

### **4. Scope of work**

The selected agency(s) will be responsible for delivering the following services:

#### **4.1 Pre-Arrival Assistance**

##### **a. Visa & Compliance Support**

- Visa application processing support.
- Facilitating immigration processes and document preparation.
- Guidance on documentation for work visas, OCI/PIO permits, and FRRO registration.
- Facilitation of MEA card issuance.
- Assistance with medical documentation for visa applications.

##### **b. Pre-Arrival Consultation**

- Assessing the expat's needs and requirements.
- Conducting pre-arrival virtual consultations.

#### **4.2 On-Arrival and Onboarding Assistance**

##### **a. City Familiarization On-Arrival**

- Provision of a city-specific welcome kit.
- Providing an orientation tour of the city.
- Providing neighbourhood insights.
- Offering a map orientation, including commute time to the office.
- Providing language training resources and cross-cultural orientation.
- Sharing information on essential services (shopping, hospitals, pet shops, recreational facilities, transport options, etc.).

##### **b. Onboarding Support**

- Arranging local SIM cards and communication services for expatriate staff.
- Assisting with mobile connections, PAN card, and bank account opening, etc.
- Assisting with legalizations, translations, and notarizations.
- Supporting consular applications and post-arrival compliance procedures.

#### **4.3 Relocation Assistance**

- Residential Search Assistance
- Pre-screening properties based on location, budget, and market trends.

- Sourcing 3-5 pre-screened housing options.
- Showcasing relevant residential properties and insights into the rental market.
- Organizing accompanied property visits and facility tours.
- Conducting due diligence and property vetting.
- a. Temporary Housing & Rental Assistance**
  - Negotiating rental agreements and ensuring smooth payment processing.
  - Coordinating security deposits.
  - Overseeing property handover and inspections.
  - Coordinating move-in and due diligence of landlords/service providers.
  - Facilitating utility connections.
- b. Legal Lease Documentation & Registration**
  - Assisting in lease negotiations in compliance with company policies.
  - Coordinating lease registration with verified legal professionals.
  - Drafting and reviewing lease documentation.
  - Accompanying expats to the registrar's office.
  - Ensuring timely handover of registered lease documents.
- c. Logistics Support**
  - Coordinating relocation logistics.
  - Ensuring seamless communication with moving companies.
  - Providing continuous logistics support during the relocation process.
- d. Household Setup & Equipment Leasing**
  - Providing rental options for furniture and appliances.
  - Arranging delivery and installation.
- e. Housing Maintenance Assistance**
  - Assigning a Single Point of Contact (SPOC) for tenancy support.
  - Providing telephonic assistance throughout the expat's tenure.
  - Conducting periodic property inspections.
  - Coordinating with technicians for maintenance and repairs.
- f. Tenancy Renewal Assistance**
  - Reviewing and drafting lease renewals.
  - Negotiating renewal terms with property owners.
- g. Transportation & Vehicle Leasing Assistance**
  - Sourcing vehicle rental options and quotations.
  - Managing documentation and rental agreements.
  - Coordinating car delivery and addressing service-related concerns.

#### **4.4 Community Integration Assistance**

- a. Cultural Adaptation & Workplace Integration**
  - Providing training on local customs, etiquette, culture, and communication styles.
  - Explaining social structures, festivals, and working culture.
  - Offering practical guidance on home life, shopping, and leisure activities.
- b. Education Advisory & School Enrolment Support**
  - Understanding educational needs and researching suitable schools.
  - Familiarizing expats with school admission procedures.
  - Arranging and facilitating school visits.

- Coordinating with schools for the admission process.
- c. Expat Networking & Community Engagement**
- Facilitating networking opportunities through professional and social groups.
  - Providing information on local events and expatriate communities.
  - Connecting expats with international networks and community clubs.

#### **4.5 Exit Support**

- Providing lease break and termination support.
- Assisting with deposit recovery and lease break penalty processing.
- Facilitating utility disconnections and membership terminations.
- Providing guidance on legal and compliance matters (PAN card, income tax, work permits, etc.).

### **5. Deliverables & Reporting**

The agency must:

- Provide periodic reports on services delivered.
- Maintain communication with the organization for issue resolution.
- Ensure timely execution of services as per agreed timelines.

### **6. Qualification criteria**

The agency must meet the following criteria:

- Demonstrated experience in expat management services.
- Strong track record of handling international assignments.
- Legal and regulatory compliance in relevant jurisdictions.
- Availability of dedicated SPOCs and multilingual support.

### **7. Contract Duration & Terms**

The engagement will be for an initial period of two (2) years, subject to performance review. The agency must ensure service continuity and adherence to agreed service levels.

### **8. Selection criteria**

- The consultants should submit their **technical and financial proposal** as a **password-protected PDF file** attached in one email, since the evaluation will be conducted through the **QBS method**.
- The proposal must be sent to the email address [tender.projects@cdri.world](mailto:tender.projects@cdri.world) with the subject line: "**Empanelment of an Expat Management Agency**" and received **by 11:59 hours (IST) on 02 April 2025**. Any proposal received by CDRI after the deadline for submission shall not be opened.
- The password for the Technical proposal PDF file is to be submitted on the same email ID once asked by the CDRI Procurement team. Times New Roman Font to be used for the Password to ensure readability.
- The agencies that are qualified in technical evaluation will be empaneled with CDRI.

- The consultant will be selected following a Quality Basis Selection (QBS).
- Proposals shall be evaluated as follows:

<b>Technical Evaluation Criteria (100 marks)</b>		<b>Marking system</b>
1.	<b>Organizational Capability and Experience</b> <ul style="list-style-type: none"> <li>• Years of experience in expat management services.</li> <li>• Proven track record of managing expatriates in New Delhi or India.</li> <li>• Experience handling clients from similar sectors or international organizations.</li> <li>• Availability of dedicated account managers with relevant expertise.</li> </ul>	35
2.	<b>Compliance and Legal Expertise</b> <ul style="list-style-type: none"> <li>• Understanding of Indian visa, immigration, and FRRO (Foreigners Regional Registration Office) regulations.</li> <li>• Knowledge of labor laws, tax regulations, and social security requirements for expatriates.</li> <li>• Ability to ensure 100% compliance with local government norms.</li> </ul>	20
3.	<b>Range of Services Offered</b> <ul style="list-style-type: none"> <li>• Visa and immigration support.</li> <li>• Relocation assistance (housing, school search, cultural orientation, etc.).</li> <li>• Payroll, taxation, and benefits management for expatriates.</li> <li>• Emergency support services (healthcare, security, etc.).</li> <li>• Support for dependents and family integration.</li> </ul>	25
4.	<b>Network and Local Partnerships</b> <ul style="list-style-type: none"> <li>• Strong network with property agents, international schools, healthcare providers, etc.</li> <li>• Ability to facilitate corporate tie-ups for accommodation, travel, and services.</li> </ul>	20
<b>Total</b>		<b>100</b>

The applicant scoring more than 70% in the evaluation shall be considered for empanelment and will be called for negotiations if required.

## 9. Other Terms & Conditions

- The proposals should be valid for 90 days after the final submission date.
- CDRI reserves the right to cancel this Request for Proposal before or after the receipt of proposals or after opening the proposal and call for fresh proposals. CDRI also has the right to reject any proposal without assigning any reason.
- CDRI may call shortlisted agencies for a presentation round.
- Agency(s) may apply for partial services explained in the scope of work.

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