

**Date of Issuance:** September 15<sup>th</sup>, 2021  
**Reposted:** November 12, 2021

**Request for Proposals (RFP)  
Marketplace Lead**

Dear Sir or Madam,

Conservation International México A.C. (hereinafter referred to as “Conservation International México”), is issuing a Request for Proposals (RFP) for a Marketplace Lead. The attached RFP contains all the necessary information for interested Offerors.

Conservation International Mexico (CI Mexico) is a non-profit organization that since 1990 has supported the development of a healthy and sustainable economy, based on the recognition and conservation of nature for human well-being. Progress has been achieved by linking public policies at different decision levels and by integrating various actions between organizations, government agencies and academic institutions that contribute to the conservation of the country's environmental services.

The Sustainable Landscape Ventures (SLV) Activity is a five-year, USD \$10 million-dollar project funded by the United States Agency for International Development (USAID) that is being implemented by CI Mexico. The Activity will serve as a financial mechanism for existing landscape projects in the country and will be led by CI Mexico in collaboration with six consortium partners. The purpose of the Activity is to develop sustainable and inclusive value chains at scale in four landscapes. The economic activities promoted must be market-driven and investor-ready. It aims to consolidate long-term partnerships among small-scale producers, investors, and buyers in Mexico in sustainable and inclusive value chains. Small-scale producers in the four landscapes will be organized into twelve Collective Business Entities (CBE) to reach scale and ensure quality; and a **Blended Finance Engine (BFE)** that will provide services to the CBEs, such as project curation, a marketplace to link producers with buyers, and access to blended finance solutions from new and existing funds.

Offerors should indicate their interest by submitting a proposal via email indicating their intention to **Tania Pantí Grajales** at [tpanti@conservation.org](mailto:tpanti@conservation.org) by **23:00 hrs Mexico City Time, on October 28<sup>th</sup>, 2021**. Interested Offerors can submit their questions to [tpanti@conservation.org](mailto:tpanti@conservation.org).

All offerors are expected to exercise the highest standards of conduct in preparing, submitting and if selected, eventually carrying out the specified work and in accordance with CI's Code of Ethics.

*Conservation International's reputation derives from our commitment to our values: Integrity, Respect, Courage, Optimism, and Passion and Teamwork. CI's Code of Ethics (the “Code”) provides guidance to CI employees, service providers, experts, interns, and volunteers in living CI's core values, and outlines minimum standards for ethical conduct which all parties must adhere to.*

*Any violation of the Code of Ethics should be reported to CI via its Ethics Hotline at [www.ci.ethicspoint.com](http://www.ci.ethicspoint.com)*

*Concerns regarding the integrity of the procurement process and documents shall be reported to [www.ci.ethicspoint.com](http://www.ci.ethicspoint.com) under the procurement and purchasing activities.*

**Request for Proposals**

RFP # **SLV-001**  
Third Revision

For the provision of

**Marketplace Lead**

Contracting Entity:

**Conservation International Mexico A.C.**

Funded under:

**Sustainable Landscape Ventures (SLV)**

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**Section 1. Instructions and General Guidance**

**1.1 Introduction**

CI, the Buyer, is soliciting offers from offerors, to submit proposals to lead the **Marketplace** component of the SLV project, which will be awarded by a “Selection Committee” who will evaluate the proposals and lead the interview process.

**OBJECTIVES:** Design and operate a Marketplace to attract buyers that are willing to partner and share risks and profits with small-scale producers.

This RFP does not obligate CI to execute a contract nor does commit CI to pay any costs incurred in the preparation and submission of the proposals. Furthermore, CI reserves the right to reject any and all offers, if such action is considered to be in the best interest of CI.

## 1.2 Offer Deadline and chronological list of events.

Offers must be received no later than **23:00 hrs on October 28th, 2021 (Mexico City time)**. Offerors are responsible for ensuring that their offers are received in accordance with the instructions stated herein. Late offers may not be considered. CI cannot guarantee that late offers will be considered.

The following calendar summarizes important dates in the solicitation process. Offerors must strictly follow these deadlines.

<b>RFP published</b>	<b>23:00 hrs on September 15<sup>th</sup>, 2021</b>
<b>Deadline for written questions</b>	<b>23:00 hrs on September 28<sup>th</sup>, 2021</b>
<b>Proposal due date</b>	<b>23:00 hrs on October 7<sup>th</sup>, 2021</b>
<b>RFP second publication</b>	<b>23:00 hrs on October 06<sup>th</sup>, 2021</b>
<b>Deadline for written questions</b>	<b>23:00 hrs on October 18<sup>th</sup>, 2021</b>
<b>Proposal due date</b>	<b>23:00 hrs on October 28<sup>th</sup>, 2021</b>
<b>RFP third publication</b>	<b>23:00 hrs on November 12<sup>th</sup>, 2021</b>
<b>Interviews</b>	<b>After December 15<sup>th</sup>, 2021</b>

The dates above may be modified at the sole discretion of CI. Any changes will be published/advertised in an amendment to this RFP.

Offerors shall submit their offers electronically at the following email address, [tpanti@conservation.org](mailto:tpanti@conservation.org).

## 1.3 Instruction for Offerors

All proposals must be submitted in one volume, consisting of:

- Technical proposal
- Cost proposal

### I. Technical Proposal

The technical proposal shall comprise the following parts:

- Part A: Technical Approach of the expected tasks, including methodology and work plan. This part shall be between 3 and 5 pages long but may not exceed 5 pages.

The Technical Proposal should describe how the offeror intends to carry out the expected tasks described in Section 2, Scope of Work (SOW). The technical proposal should demonstrate a clear understanding of the project and the work to be undertaken.

- Part B: Management, Key Personnel, and Staffing Plan. This part shall be between 2 and 5 pages long but may not exceed 5 pages. CVs for key personnel may be included in an annex to the technical proposal and will not count against the page limit. The Technical Proposal should include CV(s) of key personnel that combined, will cover most of the following work experience:
  - More than 10 years' experience in the agriculture and forest sectors in Mexico or Latin America.
  - More than 10 years' experience in value chains.
  - Deep knowledge and experience related bringing gaps and creating processes or systems to agriculture and forest value chains and business development.
  - Previous experience setting up traceability processes based on buyers' requirements, including sustainability goals (emission reduction, biodiversity, social standards or other).
  - Strong commercial relationships with buyers.
  - Knowledge on requirements for commercialization of products in Mexico and export markets.
  - Capacity to conduct analysis and reports on current market demands and trends, relevant for the sustainable agriculture and forest sectors.
  - Negotiating skills to innovate in this sector so that buyers adapt their internal purchasing policies to be more inclusive and reduce barriers to conduct business transactions will rural enterprises with sustainable practices.
  - Experience applying systems change and basic knowledge of the sustainable development goals.
  - Ability to communicate clearly across diverse socioeconomic and cultural spectrum.
  - Proven track record cultivating relationships with key decision-makers.
  
- Part C: Corporate Capabilities, Experience, Past Performance, and references. This part shall be between 2 and 4 pages long but may not exceed 4 pages and showcase specific cases that address the following experience and knowledge:
  - Commercialization of agriculture and forest products
  - Commercial relationships with traditional and niche buyers of agriculture and forest products
  - Exceptional knowledge applying relevant processes and systems.
  - Value chain design and development.
  - Market analysis and trends
  - Basic knowledge of buyers' sustainability goals (emissions, biodiversity and social)
  - Innovation in product development and branding.
  - Previous experience or partnerships with development donors or projects.

## II. Cost Proposal

The cost proposal is used to determine which proposals are the most advantageous and serves as a basis of negotiation for award of a contract. The price of the contract to be awarded will be all-inclusive. For the proposal, offerors must provide a detailed budget showing major expense line items. Offers must show unit prices, quantities, and total price. All items, services, etc. must be clearly labeled and included in the total offered price. All cost information must be expressed in USD. The cost shall also include a budget narrative that explains the basis for the estimate of every cost element or line item. Supporting information must be provided in sufficient detail to allow for a complete analysis of each cost element or line item (for example those specific to USAID contracts like approved NICRA). CI

reserves the right to request additional cost information if the evaluation committee has concerns of the reasonableness, realism, or completeness of an offeror's proposed cost.

The estimated budget is \$320,000 - \$338,000 USD for the life of the project (5 years).

### III. Evaluation and Interview process

1. A Technical Evaluation Committee formed by SLV partners and CI staff will make a technical evaluation of the proposals received, which will be ranked based on the evaluation criteria based on the RfP and ToR.  
A Financial Evaluation Committee formed by CI staff will make a financial evaluation of the proposals received, which will be ranked based on the evaluation criteria based on the RfP and ToR.
2. The top 2 ranked proposals will be invited for an interview and proposal presentation, to take place before **December 15<sup>th</sup>, 2021**
3. Based on the sum of the Technical and Financial Evaluation, the winner will be announced up to 48 hours after the interview.

### IV. Evaluation and Basis for Award

An award will be made to the offeror whose proposal is determined to be responsive to this solicitation document, meets the eligibility criteria stated in this RFP, meets the technical capability requirements, and is determined to represent the most advantageous to CI.

Following is an indicative and synthesized evaluation criteria to be used:

	Evaluation Criteria	Total Possible Points
<b>I.</b>	<b>Technical Proposal (350 points)</b>	
	<b>Part A. Technical Approach, Methodology, and Detailed Work Plan (50 points)</b>	
	Does the proposal clearly explain, understand, and respond to the objectives of the project as stated in the Scope of Work?	10
	Does the proposed program approach and detailed activities and timeline fulfill the requirements of executing the Scope of Work effectively and efficiently?	20
	Does the proposal demonstrate the offeror's knowledge related to technical sectors required by the SOW?	20
	<b>Part B. Management, Key Personnel, and Staffing Plan (150 points)</b>	
	More than 10 years' experience in the agriculture and forest sectors in Mexico or Latin America.	20
	More than 10 years' experience in value chains.	20
	Deep knowledge and experience related bridging gaps and creating processes or systems to agriculture and forest value chains and business development.	20

	Previous experience setting up traceability processes based on buyers' requirements, including sustainability goals (emission reduction, biodiversity, social standards or other).	20
	Strong commercial relationships with buyers.	20
	Knowledge on requirements for commercialization of products in Mexico and export markets.	10
	Capacity to conduct analysis and reports on current market demands and trends, relevant for the sustainable agriculture and forest sectors.	10
	Negotiating skills to innovate in this sector so that buyers adapt their internal purchasing policies to be more inclusive and reduce barriers to conduct business transactions with rural enterprises with sustainable practices.	10
	Experience applying systems change and basic knowledge of the sustainable development goals.	10
	Ability to communicate clearly across diverse socioeconomic and cultural spectrum.	5
	Proven track record cultivating relationships with key decision-makers.	5
<b>Part C. Corporate Capabilities, Experience, Past Performance, and references (150 points)</b>		
	Commercialization of agriculture and forest products	20 (130)
	Commercial relationships with traditional and niche buyers of agriculture and forest products	20
	Exceptional knowledge applying relevant processes and systems	20
	Value chain design and development.	20
	Market analysis and trends	20
	Basic knowledge of buyers' sustainability goals (emissions, biodiversity and social)	10
	Innovation in product development and branding	10
	Previous experience or partnerships with development donors or projects.	10
<b>II. Cost Proposal- Cost- Includes (Travel, Fee, Charges, any other expenses) (50 points)</b>		
	Cost	50
<b>III. Interview and presentation (50 points)</b>		
	Strong presentation and sales pitch skills during the interview of those companies selected	50

## Section 2. Scope of Work, Deliverables, and Deliverables Schedule

### 2.1. Scope of Work

The selected applicant will have the following responsibilities which will be developed in closed coordination and collaboration with CI Mexico – SLV staff and the SLV project partners for:

- Design and innovative an effective mechanism to bring agriculture and forest buyers to meet the CBEs, to match products and services of sustainable and ethical producers with responsible and ethical companies/buyers that are willing to commit to transparent and sustainable supply

chains. This coordination mechanism between buyers and suppliers is what we call a Marketplace, which is an integral part of the BFE.

- Lead outreach efforts to engage responsible buyers and organizations with interest in products or services from the four defined landscapes (Sierra Sur – Oaxaca; Sierra Madre – Chiapas; Mascota and Tapalpa – Jalisco; Calakmul - Campeche). Identify and cultivate relationships with private sector organizations committed to sustainable and ethical supply chains.
- In close coordination with CI Mexico and the financial partners of SLV, support the design and operation of the expert tables mechanism which aims to support the curation process for matching the CBEs business proposals with blended finance opportunities. These tables will bring experts from different fields including finance, sales & marketing, value chains, among others, that will help improve the business proposition to access credits from the BFE partners.
- Develop a strategy to minimize the gaps between market requirements and the current state of products on a case-by-case basis.
- Support capacity building for market knowledge, sales, and marketing for producer organizations in the four landscapes for closing the gaps identified in the expert tables.
- Collaborate in the creation and shaping of the four defined landscapes and producer organizations' value propositions.
- Support the development of new and non-traditional revenue opportunities for producer organizations.
- Support the development of market readiness of the CBEs to result in increased sales and access to new markets.
- Ensure the proper integration of environmental and social safeguards and grievance mechanism into the Marketplace.
- Participate and contribute to the BFE (Blended Finance Engine) Steering Committee meetings.
- Assist in gathering, processing, and analyzing lessons learned yearly from the Marketplace, through the life of the project; and contribute to the learning community named "Social Business Networks" led by CI, with the experiences and lessons from the Marketplace, CBEs and buyers.

#### Operational Tasks:

- Plan and coordinate the expert tables during the life of the project.
- Prepare and analyze the results from expert tables 30 days after their conclusion.
- Ensure the proper integration of environmental and social safeguards and grievance mechanism into the Marketplace
- Participate and contribute to the BFE (Blended Finance Engine) Steering Committee meetings.
- Assist in gathering, processing and analyzing lessons learned yearly through the life of the project; especially from the expert tables, marketplace, and BFE process.
- Carry out the implementation of a learning community named "Social Business Networks" that aims to disseminate knowledge and information obtained from the expert tables, marketplace, and BFE process to the CBEs and Buyers.
- Assist in gathering, processing, and analyzing lessons learned yearly from the Marketplace, through the life of the project; and contribute to the learning community named "Social Business Networks" led by CI, with the experiences and lessons from the Marketplace, CBEs and buyers.



### **Section 3. Terms of Reference and Budget Template**

In the following link, those interested in submitting proposals can download the complete terms of reference, which provide a detailed description of the activities requested in this RFP <https://www.conservation.org/mexico/convocatorias> ; In the same way, you will find the following annexes that will be useful for the presentation of the proposal:

1. Appendix I – Terms of reference
2. Appendix II – Budget Template