REQUEST FOR PROPOSAL

A DECADE OF PROGRESS:
DRIVING SUSTAINABLE PALM
OIL AND PULP AND PAPER
PRODUCTION IN INDONESIA
AND MALAYSIA
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1. Introduction and instructions

1.1. Purpose of this Request for Proposal

The purpose of this Request for Proposals (RFP) is to solicit proposals from suppliers with expertise in research and report development on sustainability, commodity-supply chains and tropical deforestation issues to produce a report on the progress made in driving sustainable commodity production in Indonesia and Malaysia in the last decade. This process will result in the selection of one supplier, who will be invited to enter a contracting phase for a specific and detailed scope of work subject to final fixed pricing.

The selected vendor will conduct an assessment of the strategies and interventions conducted in the last ten years by the government, private sector, and civil society to advance the sustainable production of palm oil and pulp and paper in Indonesia and Malaysia in their effort to reduce deforestation and conversion driven by these commodities. The report should be based on the latest existing data and research, and complemented by the perspectives of key stakeholder groups, particularly government and business.

1.2. About the World Economic Forum and the Tropical Forest Alliance

The World Economic Forum is the International Organization for Public-Private Cooperation. The Forum engages the foremost political, business and other leaders of society to shape global, regional and industry agendas. It was established in 1971 as a not-for-profit foundation and is headquartered in Geneva, Switzerland. It is independent, impartial and not tied to any special interests. The Forum strives in all its efforts to demonstrate entrepreneurship in the global public interest while upholding the highest standards of governance. Moral and intellectual integrity is at the heart of everything it does.

Our activities are shaped by a unique institutional culture founded on the stakeholder theory, which asserts that an organization is accountable to all parts of society. The institution carefully blends and balances the best of many kinds of organizations, from both the public and private sectors, international organizations and academic institutions.

The Tropical Forest Alliance (TFA) is a global multistakeholder platform focused on reducing commodity driven deforestation. Hosted by the World Economic Forum, the TFA works with over 160 public, private and civil society actors to catalyse high-impact partnerships to address the inherent tensions that exist to grow production while protecting the forests - public and private, producer and market, global and local, people and the forest frontier. The TFA operates regional platforms in Latin America, West and Central Africa, China and Southeast Asia. It is supported by the Governments of the Netherlands, Norway, Germany and the UK, as well as the Gordon and Betty Moore Foundation.

1.3. Supplier Instructions

For ease of response and evaluation, Suppliers are required to complete and submit all components of this RFP.

- Requested reference materials may be attached as Appendices. The World Economic Forum retains the right not to review any un-requested material.
• Supporting information must be presented in the same order as the questions and must be referenced to the relevant question
• Questions must be answered in English
• Failure of a Supplier to provide the required information, make a satisfactory response to any question, or supply documentation referred to in responses, within the specified timescale, may mean that the Supplier will not be invited to participate further in the procurement
• Suppliers are asked to provide one electronic copy of the response in a format compatible with Microsoft Word. It is the supplier’s responsibility to ensure that the proposal and all other required documents are received at the e-mail address named in this document by the closing date specified.
• Responses will not be returned
• Participants need to address all information specified by this RFP. All questions must be answered completely. The World Economic Forum reserves the right to verify any information contained in the participants RFP response, and to request additional information after the RFP response has been received.
• Marketing brochures included must be submitted only as attachments and must not be used as a substitute for written responses. Nevertheless, suppliers should include any additional information that they think would help the Forum evaluate their proposal.
• Furthermore, the proposal must be accompanied by a cover letter, signed by an individual authorized to bind the proposed entity (see Proposal Submission Checklist)

1.4. Procurement Key Activities and Dates

Suppliers are asked to provide the response by Monday, February 10 at 12:00 CET in electronic format to TFA@weforum.org.

Responses received after this time will not be considered.

1.5. RFP Evaluation Criteria

The Forum is looking for the most suitable partner and therefore will not simply select the economical most attractive bid or quotation, but rather use objective criteria to evaluate the best match for its demand. All supplier information provided as part of the RFP will be treated as confidential. The Forum’s criteria include, but are not limited to the following key factors:

• Conformity with requirements
• Product and required service pricing
• Implementation approach
• Quality of services as well as quality assurance
• Geographical coverage
• Demand flexibility
• Company values

The Forum will not disclose the detailed results of the selection and scoring process and reserves the sole right to decide whether a proposal complies with the requirements of the RFP and to accept, reject or negotiate modifications of supplier’s proposals.
1.6. Queries about the Procurement

Any questions about the procurement must be submitted by e-mail to TFA by Wednesday, January 29, 2020 at TFA@weforum.org. No other forms of communication or contact will be accepted. It is the World Economic Forum’s practice to communicate any question or request for clarification, with both the query and the response, in a suitably anonymous form, to all participating Suppliers. On a case by case basis if any information is deemed as confidential to a particular Supplier, this will be reviewed at the time it arises.

1.7. Proposal Submission Checklist

Proposals must include:

- A narrative describing previous experience in similar projects and answering the RFP Capability Questions in Section 2.6
- A maximum of 20 pages total
- A pricing proposal following the requirements in Section 2.5

1.8. Points of contact

Suppliers are not allowed to contact any World Economic Forum personnel, such as management or other local contacts, regarding this RFP. Any such communication may lead to the proposal received being rejected.

It is expected that the supplier also provides the World Economic Forum with a single point of contact capable of answering questions related to this RFP on a global scale.

World Economic Forum Contacts

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ornella Nicolacci</td>
<td>TFA Operations Lead</td>
<td><a href="mailto:ornella.nicolacci@weforum.org">ornella.nicolacci@weforum.org</a></td>
</tr>
</tbody>
</table>

1.9. Provided Information

This RFP contains information believed to be reliable at the date obtained but may not provide all the necessary or desirable information. Neither the World Economic Forum nor its employees or involved advisors, contractors or other representatives guarantee the completeness of these information. The document is intended solely for the information of the party to whom it is issued. All proposals will become the property of the Forum which reserves the right to use without limitations or liability for any ideas from the proposals.

The World Economic Forum reserves the absolute right to:

- Accept or reject any or all proposals
- Negotiate with any, all or no bidders
- Modify or cancel this RFP

It is the Bidder’s responsibility to:

- Properly understand and examine the RFP
- Examine all other information available on reasonable inquiry relevant to the risks, contingencies and circumstances affecting its response
- Satisfy itself as to the completeness, correctness and sufficiency of its response
1.10. Confidentiality
The Invitation document is confidential. The Forum may update or revise the document or any part of it. The recipient acknowledges that any such revised or amended document shall be received subject to the same confidentiality undertaking. The Recipient will not disclose or discuss the contents of the document with any officer, employee, consultant, director, agent, or other person associated or affiliated in any way with the World Economic Forum or any of its customers or suppliers without the prior written consent of the World Economic Forum.

1.11. Cost of Responding
All costs and expenses incurred by bidders in any way associated with the development, preparation, and submission of their responses to this RFP, including but not limited to attendance at meetings, discussions, presentations, demonstrations, etc. and providing any additional information required by the Forum will be borne exclusively by the bidder.

1.12. RFP Errors
Each recipient should notify the World Economic Forum of any error or discrepancy found in this document. Notification should be made to the contact found in proposal related details.

1.13. Liability
This invitation is not an offer by the World Economic Forum, but an invitation for responses. No contractual obligation on behalf of the Forum whatsoever exists from this process unless and until a formal contract is signed and executed by authorized people of the Forum and the select bidder.

2. Specifications

2.1. Requirements
- The supplier must have a proven track record of data collection through desk and field research, as well as from working with diverse stakeholder groups, particularly private sector
- The service provider must have deep experience in writing about sustainability (ideally tropical deforestation issues) and commodity supply chains
- Proposals must describe:
  i. Proposed methodology, to include how vendor plans to obtain data from private sector
  ii. Data sources
  iii. How supplier intends to incorporate existing research into the report
- The vendor must be cognizant of sensitivities when gathering data to avoid alienating important stakeholders
- The supplier must have a proven track record of transparency and responsibility
- All proposals must show results achieved in similar prior experience

2.2. Scope of work
The work will be an assessment of the strategies and interventions conducted in the last ten years by the government, private sector, and civil society to advance the sustainable production of palm oil and pulp and paper in Indonesia and Malaysia in their effort to reduce deforestation and conversion
driven by these commodities. The report should be based on the latest existing data and research, and complemented by the perspectives of key stakeholder groups, particularly government and business.

The supplier will provide the Tropical Forest Alliance with a structured proposal for a report that should include three main components:

1. **Fact Base / Quantitative Assessment**
   - This section should establish a fact base about the role of palm oil and pulp and paper in Indonesia and Malaysia, from an economic, social and environmental perspective.
   - What is the role and importance of these commodities for the economies of Indonesia and Malaysia? What are the trendlines related to the supply and demand of these crops and their value to the economy?
   - How does the production of these crops impact jobs, employment, and health? How does it impact the livelihoods of smallholder farmers, indigenous peoples, and local communities?
   - What has been the impact on land use change driven by the production of these commodities in the last decade? Innovations in remote sensing and earth observation technologies have made high-resolution global geospatial data more readily available than ever before. What does this data tell us about Indonesia and Malaysia, such as trendlines on forest loss/conversion and the frequency and scale of deforestation inside and outside concessions in the years 2010-2020?

2. **Qualitative Assessment: Understanding the Levers and Drivers**

   Building on the fact basis and combined with existing research and stakeholder interviews, this section should describe key historic and current actions and interventions by government, business and civil society and assess their impact on commodity production and deforestation.

   - Private sector action in the last ten years at the individual and collective levels and across the supply chain, such as NDPE commitments/agreements, partnerships, supplier engagement/suspension, smallholder engagement, deployment of traceability and forest monitoring tools and technologies, innovative finance mechanisms. An explanation of why private sector action has not been sufficient should also be included.
   - Government interventions including regulatory measures and other policies that have influenced the production of palm oil and pulp and paper in the last decade, such as the moratorium, the National Action Plan on Sustainable Palm Oil (NAP SPO), ISPO/MSPO, domestic biodiesel market, international partnerships or agreements (Norway LOI).
   - Civil society action, ranging from certification to advocacy and campaigns and other strategies aimed at achieving sustainable commodity production in driving progress. To what extent have these actions helped raise the bar? How much is driven by international versus domestic action or pressure?

This section should also consider:

- Any unintended, negative consequences of these actions on production, land use/deforestation or economic development.
The external factors that may have influenced commodity-driven deforestation. To what extent have macroeconomic issues, geopolitical conditions and global commodity markets influenced the progress made in the last decade? What has been the impact of the failure of carbon markets to create additional incentives?

3. Synthesis on Path Forward: Challenges and Opportunities:

This section should look at the current issues, priorities and tensions that will shape the path forward, and identify key recommendations for action to advance sustainable commodity production in the region.

- As we move into the 2020s, what are the key challenges to continuing the positive developments we have seen in the last decade?
- What are the difficult questions that the government, private sector and civil society both on the supply and demand side must grapple with to ensure ongoing progress?

2.3. Description of the Deliverables

The service provider will submit to TFA:

1. A stakeholder engagement and expert consultation plan (with input from the TFA team), including:
   a. Direct engagement with the TFA Southeast Asia Regional Committee
   b. Identification and engagement of key stakeholders/experts for interviews, review, feedback etc.
   c. Design and delivery of a stakeholder engagement event focused on the report at the TFA Annual Meeting in Jakarta on June 30-July 2 2020, such as a dedicated workshop/consultation session with participants.


3. A final report by September 1, 2020 in Microsoft Word.

2.4. Timeline

Proposals are due on Monday, February 10 at 12:00 CET and award will be made by mid-February. A preliminary report will be required by June 15, 2020 in advance of the TFA Annual Meeting. The final report is to be completed by September 1, 2020.

2.5. Pricing

- Proposals should be for a fixed price for the entire work, including all expenses and taxes, in Swiss Francs (CHF)
- Offers based on input-based pricing will not be considered
- Proposals will be evaluated on both total cost and on value-for-money

The products/services proposed by the prospective supplier must be aligned with the values, principles and criteria set out in the Forum’s Sustainable Procurement Policy.
## 2.6. Capability Questions

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<thead>
<tr>
<th>Ref</th>
<th>Activity</th>
<th>Capability Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAP001</td>
<td>Coverage</td>
<td>Please demonstrate your service coverage &amp; expertise (relevant to this RFP).</td>
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<tr>
<td>CAP002</td>
<td>Coverage</td>
<td>Please demonstrate your geographic coverage (relevant to this RFP).</td>
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<tr>
<td>CAP003</td>
<td>Gender Equality</td>
<td>How do you promote gender equality within your organisation?</td>
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<tr>
<td>CAP004</td>
<td>Implementation</td>
<td>What would the Forum Group need to do to enable you to carry out the required services?</td>
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<tr>
<td>CAP005</td>
<td>Knowledge Sharing</td>
<td>In which way do you propose to keep the Forum up to date on the latest research developments in the area of this RFP?</td>
</tr>
<tr>
<td>CAP006</td>
<td>Knowledge transfer</td>
<td>Please describe how you ensure knowledge transfer takes place both during and at the end of an engagement.</td>
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<tr>
<td>CAP007</td>
<td>Quality &amp; standards</td>
<td>Does your company operate a standard problem reporting and resolution procedure?</td>
</tr>
<tr>
<td>CAP008</td>
<td>Quality &amp; standards</td>
<td>Please list the standards you currently have certification for (e.g. ISO9001, ISO14001) and provide the dates on which these were achieved.</td>
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<tr>
<td>CAP009</td>
<td>Quality &amp; standards</td>
<td>The Forum will not allow consultancies to use any third party suppliers as subcontractors to deliver the service unless specifically authorised by the Forum. Do you agree to these terms?</td>
</tr>
<tr>
<td>CAP010</td>
<td>Team</td>
<td>Please present your proposed team, including CVs.</td>
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<tr>
<td>CAP011</td>
<td>Team</td>
<td>Which other clients have been serviced / are currently serviced by the proposed team?</td>
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<tr>
<td>CAP012</td>
<td>Other</td>
<td>What special talents and expertise does your firm have which separates you from other top tier firms?</td>
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