
World Economic Forum

**REQUEST FOR PROPOSALS
SHAPING TFA PHASE 3
STRATEGY & GOVERNANCE**

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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 for shaping a forward strategy and a governance refresh for the Tropical Forest Alliance (TFA) for a potential phase 3 for the TFA. The strategy and governance proposals should build on the work of the Alliance up until the present and incorporate views from key Alliance partners including the Steering Committee and the World Economic Forum as the TFA's host organization. The work should build on existing strategy work and the governance structure of the Alliance.

Suppliers should have expertise in assessments, research and report development on sustainability, commodity-supply chains, and tropical deforestation issues, as well as developing theories of change. The consultant must also have extensive experience working with multi-stakeholder platforms, convening and facilitating working groups, conducting confidential interviews, and managing sensitive information. 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.

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 catalyze 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 and the Cargill 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 November 3, 2020 at 17:00 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
- Relevant experience
- 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 October 30, 2020 at 17:00 CET 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
- A description of methodology to be used
- A maximum of 15 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

Ornella Nicolacci
TFA Operations Lead
ornella.nicolacci@weforum.org

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 anyway 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 in theories of change, data collection through desk and field research, as well as from interviewing diverse stakeholder groups, particularly private sector
- The supplier must have extensive experience formulating strategies for environmental initiatives
- The vendor must have deep knowledge of tropical deforestation issues, specifically those related to internationally traded agricultural commodities and a strong understanding of how multi-stakeholder platforms work
- The vendor must be experienced in convening and facilitating expert working groups on above mentioned topics and possess an existing network of contacts in the forests and commodities space
- The supplier will ideally be familiar with TFA's current strategy along with the Collective Action Agenda and must be knowledgeable of existing initiatives and the state of affairs in commodity supply chains and commodity-driven deforestation

- The vendor must be cognizant of sensitivities when gathering data to avoid alienating important stakeholders and ensuring all required information is collected
- The supplier must have a proven track record of transparency and responsibility

- Proposals must describe:
 - i. Proposed methodology, to include how vendor plans to obtain feedback from key stakeholders at global and local/regional levels on the best use of TFA as a global platform and the main considerations for strategy development
 - ii. Data sources
 - iii. How supplier intends to incorporate existing research into the report

- All proposals must show results achieved in similar prior experience

2.2. Scope of work

The work entails conducting a brief review of Phase 2 of TFA (June 2018-May 2021) and providing recommendations for a strategic framework and priorities for a strong Phase 3. The review will cover the broader TFA community's journey through the end of 2020. The review should naturally build off TFA's Collective Action Agenda (CAA). The strategy for phase 3 should integrate lessons learned from phase 2 along with the evolving theory of change of driving collective action and leveraging private sector leadership to encourage more policy ambition. The review should also assess how governance for the TFA needs to evolve to step up and accelerate efforts on deforestation moving into a phase 3. Research, convenings and interviews with key stakeholders at global and regional levels will be necessary to gather critical feedback on the best use of TFA as a platform. This feedback and all other data collected will be utilized in formulating a strategic framework and priorities for a potential phase 3 to start in 2021. The recommended priorities must be rooted in the CAA and the bottom up regional work that TFA has strengthened throughout Phase 2.

2.3. Description of the Deliverables

The service provider will submit to TFA as part of the project deliverables:

- i) A stakeholder engagement consultation plan to include the identification of key stakeholders for interviews (with input from the TFA team) and an expert working group
- ii) A report on consultant's review of progress achieved during Phase 2 of TFA as well as its limitations
- iii) Synthesized and organized feedback from key stakeholders on the value TFA offers as a platform
- iv) Recommendations for a strategic framework and priorities for a strong Phase 3
 - This component must also include concrete recommendations on how to deepen the partnership with the private sector, how to leverage it to mobilize and accelerate collective action, and how to build strong collaboration between public and private sector actors
 - Other areas of interest to include:
 - How to better articulate the Nature-Based Solutions agenda and highlight its relevance to the TFA community
 - How to strengthen value proposition for TFA China and the financial sector
 - Whether TFA should engage with other major consumer countries (such as India, Japan etc.)
 - How to better engage in light of the ongoing COVID-19 pandemic

- Whether TFA should broaden its focus to key commodities where TFA has had a limited footprint to date (e.g. cocoa, coffee, rubber)
- A new governance model to accelerate efforts to reduce deforestation

- A preliminary report will be due by 12/14/2020 in Microsoft Word.
- A final report will be due by 01/21/2020 in Microsoft Word.

2.4. Timeline

Proposals are due November 3, 2020 at 17:00 CET and award will be made by November 6, 2020. Expected completion date of all work is January 21, 2021.

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](#).