

November 18th, 2024

Request for Proposal (RFP)

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| Subject RFP #: | Palladium RFP – Rolling Out Training Services of Partner Trade Support Institutions in Egypt |
| RFP Issue Date: | November 18 th , 2024 |
| Terms of Reference / Specifications: | USAID TRADE seeks proposals from qualified capacity building firms to assist Trade Support Institutions in designing and delivering comprehensive capacity building programs that meet the evolving needs of exporters. |
| Project | Trade Reform and Development in Egypt (TRADE) |
| The Company | Palladium International, LLC |
| Country of Performance | Arab Republic of Egypt |
| Closing Date | December 2 nd , 2024 |
| Contact Person | Ahmed Hadi, Procurement Advisor |
| Details for Submission | Submissions should be emailed to applyTRADE@thepalladiumgroup.com |

Thank you for your interest in the above procurement. As implementer for the Project, Palladium invites you to submit a proposal for the terms of reference below. Your proposal must be valid for the Validity Period.

Please submit your proposal in accordance with the Details for Submission above by the Closing Date and Time. This RFP in no way obligates Palladium to award a contract nor does it commit Palladium to pay any cost incurred in the preparation and submission of a proposal. Palladium bears no responsibility for data errors resulting from transmission or conversion processes.

I look forward to your response. If you have any queries, please do not hesitate to contact me by e-mail applyTRADE@thepalladiumgroup.com.

Yours sincerely,

Rachid Benjelloun
Chief of Party, TRADE

Terms and conditions

1. Proposal Conditions

By submitting a proposal, potential suppliers are bound by these terms and conditions. Potential suppliers must submit offers with all details provided in English and with prices quoted in a single currency.

2. Proposal Lodgement

The Company may grant extensions to the Closing Time at its discretion. The Company will not consider any quotes received after the Closing Time specified in the RFP unless the Company determines to do so otherwise at its sole discretion.

3. Evaluation

The Company may review all proposal to confirm compliance with this RFP and to determine the best proposal in the circumstances.

4. Alterations

The Company may decline to consider a proposal in which there are alterations, erasures, illegibility, ambiguity, or incomplete details.

5. The Company's Rights

The Company may, at its discretion, discontinue the RFP; decline to accept any proposal; terminate, extend or vary its selection process; decline to issue any contract; seek information or negotiate with any potential supplier that has not been invited to submit a proposal; satisfy its requirement separately from the RFP process; terminate negotiations at any time and commence negotiations with any other potential supplier; evaluate proposals as the Company sees appropriate (including with reference to information provided by the prospective supplier or from a third party); and negotiate with any one or more potential suppliers.

6. Amendments and Queries

The Company may amend or clarify any aspect of the RFP prior to the RFP Closing Time by issuing an amendment to the RFP in the same manner as the original RFP was distributed. Such amendments or clarifications will, as far as is practicable be issued simultaneously to all parties.

Any queries regarding this RFP should be directed to the Contact Person identified on the cover page of this RFP.

7. Clarification

The Company may, at any time prior to execution of a contract, seek clarification or additional information from, and enter discussions and negotiations with, any or all potential suppliers in relation to their proposals. In doing so, the Company will not allow any potential supplier to tailor or amend their proposal.

8. Confidentiality

In their proposal, potential suppliers must identify any aspects of their proposal that they consider should be kept confidential, with reasons. Potential suppliers should note that the Company will only agree to treat information as confidential in cases that it considers appropriate. In the absence of such an agreement, potential suppliers acknowledge that the Company has the right to disclose the information contained in their proposal.

The potential supplier acknowledges that during this RFP, it may become acquainted with or have access to the Company's Confidential Information (including the existence and terms of this RFP and the TOR). It agrees to maintain the confidence of the Confidential Information and to prevent its unauthorised disclosure to any other person. If the potential supplier is required to disclose Confidential Information due to a relevant law or legal proceedings, it will provide reasonable notice of such disclosure to the Company. The parties agree that this obligation applies during the RFP and after the completion of the process.

9. Alternatives

Potential suppliers may submit proposals for alternative methods of addressing the Company's requirement described in the RFP where the option to do so was stated in the RFP or agreed in writing with the Company prior to the RFP Closing Time. Potential suppliers are responsible for providing a sufficient level of detail about the alternative solution to enable its evaluation.

10. Reference Material

If the RFP references any other materials including, but not limited to, reports, plans, drawings, samples or other reference material, the

potential supplier is responsible for obtaining the referenced material and considering it in framing their proposal. And provide it to the Company upon request.

11. Price/Cost Basis

Prices or costs quoted must show the tax exclusive price, the tax component, and the tax inclusive price.

The contract price, which must include all taxes, supplier charges and costs, will be the maximum price payable by the Company for the Goods and/or Services.

12. Financial information

If requested by the Company, potential suppliers must be able to demonstrate their financial stability and ability to remain viable as a provider of the Goods and/or Services over the term of any agreement.

If requested by the Company, the potential supplier must promptly provide the Company with such information or documentation as the Company requires to evaluate the potential supplier's financial stability.

13. Referees

The Company reserves the right to contact the potential supplier's referees, or any other person, directly and without notifying the potential supplier.

14. Conflict of interest

Potential suppliers must notify the Company immediately if any actual, potential or perceived conflict of interest arises (a perceived conflict of interest is one in which a reasonable person would think that the person's judgement and/or actions are likely to be compromised, whether due to a financial or personal interest (including those of family members) in the procurement or the Company).

15. Inconsistencies

If there is inconsistency between any of the parts of the RFP, the following order of precedence shall apply:

- (a) these Terms and Conditions.
- (b) the first page of this RFP; and
- (c) the Schedule

so that the provision in the higher ranked document will prevail to the extent of the inconsistency.

16. Collusion and Unlawful Inducements

Potential suppliers and their officers, employees, agents, and advisors must not engage in any collusive, anti-competitive conduct or any other similar conduct with any other potential supplier or person or quote any unlawful inducements in relation to their proposal or the RFP process.

Potential suppliers must disclose where proposals have been compiled with the assistance of current or former the Company employees (within the previous 9 months and who was substantially involved in the design, preparation, appraisal, review, and or daily management of this activity) and should note that this may exclude their proposal from consideration.

Potential suppliers warrant that they have not provided or offered any payment, gift, item, hospitality or any other benefit to the Company, its employees, consultants, agents, subcontractors (or any other person involved in the decision-making process relating to this RFP) which could give rise to a perception of bribery or corruption in relation to the RFP or any other dealings between the parties.

17. Jurisdiction

This RFP shall be subject to the laws of the District of Columbia, United States of America. The language of the arbitration will be English.

The Potential Supplier and the Company will use their best efforts to settle amicably any dispute, controversy, or claim arising out of, or relating to this RFP or the breach, termination, or invalidity thereof. If no agreeable settlement can be found, any dispute, controversy, or claim arising out of or relating to this RFP or the breach, termination, or invalidity thereof, shall be settled by mediation through the American Arbitration Association by filing a request for mediation with the AAA and the other party. The Parties will be bound by any arbitration award rendered because of such arbitration as the final adjudication of any such dispute.

Schedule - Terms of Reference

Introduction

Over the past three years, the USAID TRADE has been committed to assisting its partner TSIs in developing and providing trade services that are both efficient and effective for their members across three key areas:

- Trade information and intelligence,
- Export development and capacity-building,
- Export promotion

The primary goal of this Technical Assistance (TA) is to foster active TSI staff engagement in developing new and/or improved services through a learning-while-doing approach. USAID TRADE has designed interventions to build sustainable and adaptable service systems within partner TSIs. By fostering a participatory approach, the project empowers TSIs to tailor services that respond to the evolving client needs.

To achieve this, TRADE has been guiding TSIs through a comprehensive process:

- **Training needs assessment:** The project guided TSIs in conducting assessments to identify the specific training needs of their member companies, considering factors such as companies' level of internationalization.
- **Training design:** Based on the needs assessments, TRADE collaborated with TSIs to develop tailored capacity building programs that address the diverse export readiness levels of their members, ensuring maximum impact and relevance.
- **Annual training agenda:** The project supports TSIs in constructing and communicating an annual training agenda to their members, providing a clear roadmap for capacity-building initiatives.
- **Delivery modalities:** Capacity building is delivered through a combination of in-person and online formats to maximize hands-on learning and networking while increasing reach and accessibility.
- **Collaborative curriculum development:** Training modules are developed/ tuned in close collaboration with TSIs to ensure their relevance to the unique requirements of member companies.
- **Impact measurement:** The project guides TSIs in setting KPIs to measure the impact of their capacity-building efforts, ensuring the capacity building programs deliver tangible benefits to member companies.
- **Standard Operating Procedures:** The project also supports partner TSIs with SOPs to ensure the institutionalization and sustainability of the capacity building services.

Capacity building modalities supported by USAID TRADE include customized trainings and bootcamps, each tailored to the specific learning preferences and needs.

Training: Interactive sessions to address broader range of export-related topics, tailored to meet the diverse needs of TSIs and their member companies. Training sessions are conducted for specific sectors, so ensuring that the content is oriented towards that industry, including relevant examples and cases, is crucial. Trainings duration may be determined depending on the complexity of the topic and the specific needs of the TSI members. These sessions are conducted at the premises of the partner TSI(s).

Bootcamp: An intensive, 2-day program to equip participants with advanced knowledge and practical skills related to export operations, covering specialized topics that require in-depth engagement. Bootcamps are typically immersive and fast-paced, providing practical, hands-on experience in a condensed timeframe. This modality is particularly focused on top management and business owners. It is designed for participants to share knowledge and inspiration, interact with case studies related to the bootcamp topic, practice what they learn through small assignments or projects, and receive feedback from industry leaders who are invited to enrich the experience.

By assisting TSIs in successfully implementing these capacity-building initiatives, the project enables them to increase their member companies' export capacities, which is necessary to grow their export revenues and expand in global markets. Meanwhile, this diversifies TSIs' service-related revenue streams and improves their financial viability.

Purpose

USAID TRADE seeks proposals from qualified capacity building firms to assist TSIs in designing and delivering comprehensive capacity building programs that meet the evolving needs of exporters. This RFP outlines the requirements for capacity building/consulting firms capable of delivering high-quality capacity building programs over a twelve-month period. The work will encompass two distinct formats:

bootcamps and training. These programs will be developed/ tuned in collaboration with TSIs and tailored to address the specific training needs of their member companies.

The USAID TRADE project invites proposals from firms experienced in delivering impactful capacity building services. The aim is to improve the quality and relevance of trade support services provided to exporters, ensuring that capacity building contributes to the growth and competitiveness of participating companies.

Type of Contract

Blanket Purchase Agreement that will result in fixed price purchase orders.

Anticipated Contract Term

12 months

Project

The Trade Reform and Development in Egypt (TRADE) Activity is a USAID funded contract implemented by Palladium. The goal of the TRADE Activity is to increase Egypt's international trade by increasing exports from SMEs, and in particular New and Expanding Export-Ready Enterprises (NEEREs). This will be achieved by addressing the constraints that impede the competitiveness of Small and Medium-sized Enterprises (SMEs). To achieve the Activity's goal (increasing exports in selected sectors), the Contractor must attain the following three Results:

1. Enhanced Export Capacity of SMEs, in particular New and Expanding Export- Ready Enterprises (NEEREs) in Selected Sectors
2. Strengthened Public and Private Trade-Support Institutions (e.g., Trade Associations, Export Councils, etc.); and
3. Improved Trade and Investment Policy, Regulatory and Institutional Environment

Timeline

- Issuance date: November 18th, 2024
- Questions Deadline: November 20th, 2024
- Respond to the questions: November 24th, 2024
- Submission Deadline: December 2nd, 2024
- Anticipated Award Date: December 12th, 2024

Scope of Work and Standards

The project works with more than 20 TSIs, and the scope of this assignment focuses on 7 sectors:

- Food Export Council
- Engineering Export Council
- Apparel Export Council
- Chemicals Export Council
- Building Materials Export Council
- Packaging and Printing Export Council
- Home Textile Export Council

The capacity building programs will consist of two main modalities: Bootcamps and Trainings. The duration and frequency of sessions will vary based on the topic, depth of content, and the needs of the participating TSIs. Sessions may be repeated and customized to address the specific challenges, focus areas, or expertise levels of different TSIs, ensuring a personalized approach that maximizes the effectiveness of the training. TSIs will be responsible for marketing the program and managing all direct communications with their members attending the capacity building programs. However, the service provider will facilitate the participation of high-level private sector panel members in each bootcamp, ensuring their relevance to the topic. The consulting firm selected is expected to assist TSIs to prepare

and deliver up to 35 programs.

Possible topics include but are not limited to:

- Export Strategy Development
- Export Risk Management
- Supply Chain Management
- Digital Marketing
- International Access Market Requirements
- International Trade Policies
- Export Logistics and Procedures
- Export Finance
- Export Strategy Development
- Enhanced Brand Positioning
- Digital Marketing
- Commercial Agency Agreement
- Export Risk Management
- Corporate Governance
- Export Contract Negotiation
- Supply Chain Optimization for Specialized Products
- Sustainable and Environmentally Friendly Export Practices
- International Market Entry Strategy
- Effective Participation in International Trade Fairs and Exhibitions
- Export Market Research & Trade Information Analysis
- Ecommerce for Exports
- AI for Operation & Communication Efficiency
- Gender focused Leadership Retreat
- Other business and export-related topics

Deliverables

For every capacity building program, the selected contractor shall submit two reports, a Pre-program and Post-program report as follows:

| Milestone | Description | Documentation Required | Payment Terms |
|---------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|
| Pre-program | This phase shall include all the preparations prior to the delivery of the capacity building module. To include coordinating with the TSIs and organizing preparatory meetings with them, capacity building modality (Training/ Bootcamp), program duration, curriculum, Agenda, and list of participants. | <ul style="list-style-type: none"> • program brief as per the preparatory meetings between the TSIs and instructor(s), that summarize the training objective, intended learning outcomes, target audience, program modality (Training/ Bootcamp), and program duration, etc, • Materials, templates, presentations, case studies and assignments. • Final list of Participants and agenda. | 100% of the payment after the delivery of the program and acceptance of the post program report |
| Post-program | This includes the delivery of the capacity building module. | <ul style="list-style-type: none"> • Delivery of the capacity building module. • Final report that includes analysis of the participating companies (for example size of the | 100% of the payment after the delivery of the program and |

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| | | company, level of representation, gender, etc.), overall evaluation of the conducted program, recommendation. | acceptance of the post program report |
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Evaluation and Award Process

Evaluations will be made on a best value, trade off basis. Proposals must meet the following criteria to be considered eligible:

- This solicitation is open to Egyptian companies/service providers.
- All documents must be submitted as per the instructions below.
- Companies might be from any nationality that is not restricted by geographic code = 937 (Please refer to Source, Nationality and Origin Restrictions section below). Companies may form partnerships to bid for this solicitation
- Offerors must demonstrate:
 - A track record of successfully developing and conducting export training programs in Egypt.
 - Ability to pass Palladium’s due diligence standards.
 - Not barred from working with the US government.

The TRADE Project reserves the right to sign and award contracts(s) to one or more service provider(s). In addition, the TRADE Project reserves the right to split the assignment between service providers. Multiple awards may be granted.

A selection committee will review the technical approach, price, and professional references. The selection criteria are based on the following:

1. Technical and Management approach.
2. Personnel qualifications.
3. Experience in developing and conducting capacity building programs, professional references.
4. Financial proposal.

The offerors are encouraged to offer their best terms and prices with the original submission. Palladium reserves the right to award under this solicitation without further negotiations. The offerors are encouraged to offer their best terms and prices with the original submission.

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SOURCE, ORIGIN AND NATIONALITY RESTRICTIONS

- The geocode 937- encompasses the United States, Egypt, and developing countries other than advanced developing countries, but excluding any country that is a prohibited source. Only service providers falling within this specified geographic code will be eligible for consideration for the award.

References:

- USAID ADS Chapter 310: <https://www.usaid.gov/ads/policy/300/310>
- USAID List of Prohibited Source Countries: <https://www.usaid.gov/ads/policy/300/310mac>

PROCUREMENT INTEGRITY AND ETHICS

- It is Palladium’s Policy that no gifts of any kind and of any value be exchanged between vendors/contractors and Palladium personnel. Discovery of the same will be grounds for disqualification of the vendor/contractor from participation in any Palladium’s procurements and may result in disciplinary actions against Palladium personnel involved in such discovered transactions.

Instructions to the Offerors

Your proposal must comprise the following submission documents. The technical proposal and financial proposal must be prepared as separate files, per the below instructions. Technical proposals must be sent as a maximum of 15 A4 pages, except for the past performance statement and references, which should be separate from the proposal and limited to 5 pages. CVs must be provided as attachments and do not count as part of the 15 pages limit. Submissions in Word and PowerPoint or in PDF are acceptable, although PDF is preferred.

The following items are required to be submitted as part of the proposal:

- **Technical proposal** will consist of technical and management approach, personnel, and past performance information, which are listed in order of importance for evaluation purposes. Please limit your technical proposal to no more than fifteen (15) pages, except for the past performance statement and references (attached separately and limited to 5 pages). Offerors will detail their **technical approach** to fulfilling RFP objectives including outlining the approach to prepare and deliver the package of the capacity building programs that are best selected to serve the objective of the TRADE project. The technical approach will clearly indicate how the proposed activities will result in the successful completion of all deliverables and milestones.

The technical proposal must also include **personnel** and **management** information, including key consultants that will manage and provide services (CVs must be provided as attachments and do not count as part of the 15-pages limit), and how the offeror will ensure quality and timely submission of deliverables. Offerors must submit a past performance statement with previous experience in developing business/export capacity building programs and three professional references. Offerors must submit a past performance document that speaks to the Consultants' experience successfully developing and conducting export training programs in Egypt. Offerors must also submit three professional references, including email and phone number contract information and outlining the nature of the relationship between the offeror and reference. This requirement can be submitted either in Word or PDF (maximum of five pages) and will form part of the technical proposal. It is separate from the 15- A4 pages.

- **Financial Proposal** must be submitted in the excel format attached in Annex B. Bidders must detail the costs associated with preparing and delivering training and bootcamp modules in and outside Cairo. The contract type for the presumptive award will be Fixed Price deliverable-based, with a payment structure detailed in Annex B. Prices shall be based on training day (reference to annex B - Price list breakdown). Rates shall be inclusive of consultants' daily rate, transportation, accommodation, printings, etc.

Upon selection, offerors must complete Due Diligence Questionnaire if selected for award within 5 days. Organizations must have a UEI number or obtain one within 5 days of being notified of selection.

Attachments

Please review the additional documentation and proposed contracts terms and conditions which should be given consideration when preparing your proposal. By submitting your bid, you will certify that that you agree with the contract terms and conditions as included in this solicitation and that all prices include all aspects of the required compliance with the terms and conditions of the proposed contract.

- Annex A - BPA Contract Template.
- Annex B - Financial Proposal Format
- Annex C - Past Performance Format
- Annex D – Palladium Due Diligence Form(s)
- Annex E - Palladium Business Partner Code of Conduct.
- Annex F - Certifications: Terrorism, Anti-Kick Back, Debarment, Foreign Corrupt Practices Act

You can access the annexes using this link: https://palladiumgroup-my.sharepoint.com/:f/g/personal/ahmed_abdelhadi_thepalladiumgroup_com/Eg_ZiE_X_wdLg3TSb9gWFaoBJuJwZoLFeCwQvGYAXmGaog?e=IF8I9M

Any contract/purchase order resulting from this solicitation must be signed by both parties to be considered valid and in force. All costs associated with, but not limited to, production, preparation and/or delivery of goods or services, including deliveries, accepted by Palladium staff, without a fully executed (signed by both parties) contract/purchase order, are at the vendor's risk only. Palladium shall not pay for any costs, without limitation, associated with production, preparation or delivery of goods and/or services under this or any other contract/purchase order, which has not been signed by both parties.

If your proposal is successful, you will be required to enter the Company's standard contract for the types of goods or services being provided. In the provision of the Goods and Services, you will be required to comply with the Company's policies, including (without limitation) its Business Partner Code of Conduct and any relevant client terms and conditions. Potential suppliers must also comply with the Company's Business Partner Code of Conduct in the submission of any proposals pursuant to this RFP.

If you are bidding as part of a joint venture, partnership or similar, please make this clear in your submission. Likewise, if you propose to subcontract any part of the goods or services provision, then disclose this fact within your submission. The Company may require additional information from you and approval for subcontracting will not be automatic as subcontractors will be subject to Palladium's Due Diligence process

