

December 13, 2023

Request for Quotation (RFQ) for Services

RFQ Title:	Coordination of the Partnerships for Forests (P4F) final event in Latin America
RFQ Issue Date:	December 13, 2023
Terms of Reference / Specifications:	The services to be delivered are detailed in this document
Project	Partnerships for Forests - P4F-0844
The Company	Palladium International Limited
Jurisdiction	England and Wales
Closing Date and Time	January 07, 2024 at 23:59 (BRT)
Contact Person	Mônica Souza (Results Manager)
Validity Period	30 days
Details for Submission	monica.souza@thepalladiumgroup.com

Thank you for your interest in the above procurement. As the implementer of the Partnerships for Forest programme, the Company invites you to submit a quote for the Services listed below. Your quote will be valid for the Validity Period.

Please forward your quote in accordance with the Details for Submission above by the Closing Date and Time.

I look forward to your response. If you have any queries, please do not hesitate to contact me on +55 61 99399-3511 or by e-mail monica.souza@thepalladiumgroup.com

Yours sincerely,

Mônica Coutinho de Souza

Terms and conditions

1. Quote Conditions

By submitting a quote, 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. Quote 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 RFQ unless the Company determines to do so otherwise at its sole discretion.

3. Evaluation

The Company may review all quotes to confirm compliance with this RFQ and to determine the best quote in the circumstances.

4. Alterations

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

5. The Company's Rights

The Company may, at its discretion, discontinue the RFQ; decline to accept any quote; 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 Quote; satisfy its requirement separately from the RFQ process; terminate negotiations at any time and commence negotiations with any other potential supplier; evaluate quotes 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 RFQ prior to the RFQ Closing Time by issuing an amendment to the RFQ in the same manner as the original RFQ was distributed. Such amendments or clarifications will, as far as is practicable be issued simultaneously to all parties.

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

7. Clarification

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

8. Confidentiality

In their quote, potential suppliers must identify any aspects of their quote 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 quote.

The potential supplier acknowledges that in the course of this RFQ, it may become acquainted with or have access to the Company's Confidential Information (including the existence and terms of this RFQ 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 RFQ and after the completion of the process.

9. Alternatives

Potential suppliers may submit quotes for alternative methods of addressing the Company's requirement described in the RFQ where the option to do so was stated in the RFQ or agreed in writing with the Company prior to the RFQ 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 RFQ 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 quote. And provide it to the Company upon request.

11. Price Basis

Prices quoted must be provided as a fixed maximum price and show the tax exclusive price, the tax component and the tax inclusive price.

The contract price, which must include any and 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 reasonably requires in order 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 RFQ the following order of precedence shall apply:

- (a) these Terms and Conditions;
- (b) the first page of this RFQ; 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 quote or the RFQ process.

Potential suppliers must disclose where quotes 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 quote 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 RFQ) which could give rise to a perception of bribery or corruption in relation to the RFQ or any other dealings between the parties.

17. Jurisdiction

This Agreement shall be subject to the laws of the Jurisdiction.

The Supplier and the Company will use their best efforts to settle amicably any dispute, controversy, or claim arising out of, or relating to this Agreement 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 Agreement or the breach, termination, or invalidity thereof, shall be settled by arbitration in accordance with the UNCITRAL Arbitration Rules in effect on the date of this Agreement. The appointing authority shall be the Secretary-General of the Permanent Court of Arbitration. The Parties will be bound by any arbitration award rendered as a result of such arbitration as the final adjudication of any such dispute.

The place of arbitration shall be the headquarters location of Company at the time the claim is filed and the language of the arbitration will be English. The relevant laws shall be the laws of the Jurisdiction.

Schedule - Terms of Reference

Activity No. P4F-0844

1. Background

Partnerships for Forests (P4F) is a six-year programme funded by the UK Foreign, Commonwealth and Development Office (FCDO) to support impact businesses in building a sustainable, vibrant and inclusive rural economy that supports sustainable land-use management and helps to reduce greenhouse gas emissions.

The diverse initiatives in the P4F portfolio include improving community governance models for the commercial use of forest products, achieving management excellence and cost savings across agricultural value chains, designing market and marketing strategies for sustainable products, crafting innovative financial arrangements to support agribusiness sustainability, and improving technologies to meet market needs.

As P4F approaches the end of its implementation, the programme will organise a final event to disseminate important learnings collected in the past 6 years, discuss relevant topics in the sustainable land use area, and connect with players in the ecosystem.

The final event will take place in the city of São Paulo on March 05 and 06, 2024. The first day of the event will be held during all day and will count with approximately 100 participants, including P4F team members, grantees, implementation partners, UK government post and central offices, impact businesses, potential investors (commercial, impact, philanthropy), other relevant actors of the impact ecosystem. The second day of the event will take place only during the morning and will have approximately 40 participants focused on the GESI (Gender Equality and Social Inclusion) topic with discussions around the Female Leadership initiative.

2. Objectives and Scope of the Assignment

This Request for Quotation is looking for a supplier to support the organisation of the P4F final event LATAM on March 05 and 06, 2024. All the services presented below will be needed for the first day of the event. For the second day of the event, only the services “catering” and “marketing materials” will be needed from the list of services below. The selected company of this Request for Quotation will be responsible for delivering all the services presented below.

Palladium will provide the full list of invited participants for the first and second day of the event.

The scope of the work will include the following activities and deliverables:

- *Flight booking: Coordination of domestic and international flight arrangements, encompassing quoting, booking, ticket issuance, rescheduling, and cancellations. This is in order to fulfill the requirements of approximately 80 participants attending the event. Participants may originate from various locations, including Brazil, Peru, Colombia, the United Kingdom, the United States, or other countries, in accordance with the customer's specifications. Please note, business and first-class travel or fully flexible tickets for flights or ground transportation are not allowed.*
- *Local transportation booking: Coordination of local transportation arrangements, encompassing quoting, booking, rescheduling, and cancellations. This is in order to fulfill the requirements of approximately 80 participants attending the event. Participants may originate from various locations,*

including Brazil, Peru, Colombia, the United Kingdom, the United States, or other countries, in accordance with the customer's specifications.

- *Hotel accommodations: Coordination of domestic and international hotel accommodations, encompassing quoting, booking, rescheduling, and cancellations. This is in order to fulfill the requirements of approximately 80 participants attending the event. Participants may originate from various locations, including Brazil, Peru, Colombia, the United Kingdom, the United States, or other countries, in accordance with the customer's specifications. Please note, in most countries 3 or 4 stars hotels will provide suitable security and hygiene standards. 5 stars hotels are not allowed.*
- *Catering: The catering service for the event will be led by a qualified professional responsible for coordinating and supervising the preparation, presentation, and delivery of food and beverages. In collaboration with the P4F team, the service provider will develop a customised menu to ensure a healthy and sustainable culinary experience throughout the event. Please, consider an inclusive menu for participants with food restrictions (e.g., veganism, gluten-free, lactose-free, allergies, etc). Key responsibilities include menu planning, quality control of ingredients, food preparation, on-site services during the event, and post-event area cleanup. This service is crucial to delivering a memorable culinary experience aligned with the event's sustainability values, ensuring that participants enjoy high-quality meals over the two days of the event. During the event on March 5, the catering will include a breakfast, lunch, coffee-break and a cocktail at the event. On March 6, the catering will include only a breakfast. Please note, alcoholic drinks are not permitted.*
- *Event reception coordination services: Supervise the reception process for the event ensuring a bilingual welcome in English, Spanish and Portuguese. The company will also be tasked with the effective management of guest entry, meticulous distribution of credentials, and provision of comprehensive information regarding the event spaces.*
- *Master of ceremony: This role involves hosting and guiding the participants, engaging the audience, encouraging participation and maintaining a lively atmosphere, help in the transitions between different parts of the event and introducing speakers or activities, handling unexpected situations or changes in the program professionally, being the face of the event, embodying its tone, and sharing important information with attendees. The Company has suggestions for the Master of Ceremony if needed.*
- *Simultaneous translation services with technical oversight: Hiring and coordinating services for simultaneous oral translation, to be conducted immediately after the speaker's address without interruptions. The service should encompass elements such as interpreters, a soundproof isolation booth for interpretation, microphones, headphones with receivers and transmitters, each with a channel for Portuguese, English, and Spanish. Additionally, a control centre for the distribution and management of headphones with their respective receivers, along with all other necessary equipment for the setup, transmission, and reception of interpreted audio. A technical operator is required to supervise all stages of installation, testing, execution, and equipment dismantling. Please expect approximately 80 users of this service during the event.*
- *Lead the process of developing the event's marketing materials: Facilitate the creation of invitations, individual credentials, event materials, and related items. It is noteworthy that P4F benefits from the expertise of an in-house designer who can provide support in crafting these materials.*

These items do not need to be included in the proposal:

- *Space rent, media equipments (screen, projectors, microphones, WIFI connection), cleaning services, technological support.*

3. Specification of the Advisory Support

The supplier for the P4F final event needs robust event management experience, especially in sustainability and social impact sectors, handling logistics for international participants. They should excel in coordinating

flights, local transport, and accommodations across multiple countries. Catering expertise ensuring sustainable, high-quality meals is crucial. Bilingual proficiency (English, Spanish and Portuguese) for efficient reception and coordination is required. Strong facilitation and moderation skills are needed for discussions on sustainability and gender equality. Organizing seamless simultaneous translation services (Portuguese, English, Spanish) and overseeing marketing materials creation aligned with the event's theme are essential. Understanding sustainability practices and past experience in similar large-scale international events, coupled with adaptability to changing needs, rounds out the necessary competencies.

4. Duration and Phasing

The activity is to commence on January 15, 2024 and end on March 7, 2024.

Deliverables:

- January 2024: the first deliverable will include a detailed timeline and the mapping of potential suppliers;
- February 2024: the second deliverable will include the flight tickets, hotel bookings and transportation contracted, as well as all the other services hired;
- March 2024: the final deliverable will include the delivery of the event;

All reports (technical and financial) should be delivered by March 7, 2024, the latest.

5. Evaluation Process

The Company will evaluate potential suppliers on the basis of a technical assessment of a technical submission and a financial assessment of a financial submission.

The Technical Assessment will be undertaken by an internal Procurement Committee.

The Technical Assessment will account for 80% of the overall score using the following formula:

$$\text{Technical Score} = \frac{\text{Potential Supplier's Weighted Technical Score (out of 100)}}{\text{Highest Weighted Technical Score (out of 100)}} \times 80\%$$

Following consideration of the technical merit of potential suppliers, a like-for-like price assessment will be undertaken by the Company of only the potential suppliers assessed as technically suitable (those meeting the Minimum Score Requirement).

The like-for-like price assessment will represent 20% of the overall score using the following formula:

$$\text{Price Score} = \frac{\text{Quotation Price of Lowest Priced Technically Acceptable RFQ}}{\text{Potential Supplier's Quotation Price Tender Price}} \times 20\%$$

6. Technical Assessment

The Technical Assessment places emphasis on the degree of confidence the Company has in a potential supplier's ability to deliver the services effectively.

The following selection criteria and weighting will be used in the assessment of the technical capacity of a potential supplier.

Scoring Methodology for the Technical Submission	
5	Excellent, addresses the requirements of the TOR, and where relevant demonstrates fine tuning, to make a match with Client expectations, and is of a quality and level of detail and understanding that provides confidence in certainty of delivery and permits full contractual reliance (where applicable).
4	High degree of confidence that they can meet the requirements of the TOR (and where relevant strong evidence they have tailored their response to meet these). Demonstrates they have a thorough understanding of what is being asked for and that they can do what they say they will; translates well into contractual terms (where applicable).
3	An understanding of all issues relating to delivery of the TOR and tailoring the response to demonstrate that proposals are feasible so that there is a good level of confidence that they will deliver; can be transposed into contractual terms (where applicable).
2	Understands most of the issues relating to delivery of the TOR and addresses them appropriately with sufficient information, but only some relevant tailoring and so only some confidence that they will be able deliver in line with expectations.
1	Some misunderstandings of the issues relating to delivery of the TOR and a generally low level of quality information and detail. Poor appetite to tailor when asked and so fails to meet expectations in many ways and provides insufficient confidence.
0	TOR issues are scantily understood and flimsy on quality information, with minimal tailoring if anywhere relevant. Provides no confidence that the issues will be addressed and managed at all in line with expectations.

Technical Submissions must be in the following format and must follow the question structure below:

Form of Technical Submission		Page Limit	Weight X Score		Max Weighted Score	Minimum Score Requirement
1	<u>Quality of Personnel and/or Partners</u> Potential Suppliers should describe, referring to the CVs submitted to evidence any statements, how the Nominated Personnel fulfil each of the criteria set out in the Specification of the Advisory Support section and are sufficiently skilled staff to undertake all aspects of the Objectives and Scope of the Assignment.	[1.5 pages]	6	0 to 5	30	2 out of 5
	Response:					
2	<u>Relevant Experience</u> Potential Suppliers should identify [2] assignments undertaken within the last [2] years relevant to this TOR and the project context. A brief summary of each of the assignments should be provided, as should the name and	[1 pages]	4	0 to 5	20	2 out of 5

	contact details for referees who can verify performance.					
	Response:					

1. **CVs must be provided** for all Nominated Personnel expected to contribute to the performance of this TOR (no longer than [four pages] in length).
2. The relevant experience should **not exceed [five pages]** (excluding CVs), must be in single column format and not be in a type font of less than 12 points.

7. Financial Assessment

Using the below format potential suppliers must state the daily fee rates (based on an 8 hour working day for one person) for all the Nominated Personnel. Fee rates should include all costs that are not reimbursable, and must be in Pound Sterling (GBP).

The Quotation Price (which should be inclusive of any relevant taxes) will form the basis of the comparative price assessment. The Quotation Price (in addition to any Reimbursable Expenses) shall be the amount that is used for contracting.

Consultant	Daily Fee Rate	Number of Days	Cost
E.g. Consultant A	e.g. £100	e.g. 2	e.g. £200 (2x£100)
E.g. Consultant B	e.g. £50	e.g. 3	e.g. £150 (3x£50)
Total Cost excluding Taxes			e.g. £350
Any Relevant Taxes (e.g. VAT)			e.g. £70
Quotation Price			e.g. £420

Using the below format potential suppliers must provide a budget and total value of all expected Reimbursable Expenses. These will not form part of the Quotation Price and will not be considered in the comparative price assessment, but (in addition to the Quotation Price) shall be used for contracting.

Reimbursable Expenses	Units	Price	Cost
E.g. International Flight to [X] from [X]	E.g. 2 (if 2 consultants)	e.g. £100	e.g. £200 (2 x £100)
Total Reimbursable Expenses			e.g. £200

Potential suppliers should note that the Financial Limit of this RFQ is £45,000 and that the Quotation Price plus (+) the Total Reimbursable Expenses cannot exceed the Financial Limit. Where the Financial Limit is exceeded, the Company reserves the right not to accept the RFQ.

The following financial aspects need to be taken into consideration:

- a. the financial proposal should be divided in three parts: (1) logistics, including the value for air flights, hotel bookings, and transportation); (2) operations, including catering, receptionist, translation, master of ceremony, marketing materials; and (3) Human resources, personnel involved in implementing the scope of work;
- b. the rates should be based only on the number of days specified the Terms of Reference;
- c. all activity preparation costs are the responsibility of the potential supplier;

- d. a requirement is for the preferred potential supplier to submit a Technical and Financial Report. All costs associated with the preparation and submission of these reports are the responsibility of the preferred potential supplier.
- e. payment of fees and reimbursable costs may be withheld due to non-approval by the Regional Programme Manager of the Technical and Financial Reports.
- f. to be eligible for reimbursement all Reimbursable Expenses must be incurred in accordance with the P4F Guidelines for Using Grant Funds. Inclusion in a successful quotation will not mean Reimbursable Expenses are eligible for reimbursement if they are contrary to the P4F Guidelines for Using Grant Funds.

8. Responsibilities of the Company

Confirm that the selected Consultant is aware and compliant with all terms and conditions of the contract and briefing documents.

9. Contractor Responsibilities

To be prepared to sign the Standard Contract Terms.

To have in place insurance policies covering Professional Indemnity and Public Liability (if contracting as an appropriately registered entity rather than in an individual capacity).

To be registered in a Jurisdiction that is acceptable to the Company. The company must have a valid and active National Register of Legal Entities (CNPJ) in Brazil.

To hold any regulatory permits or approvals required to provide the services, either as an individual or through a registered entity.

To complete the technical and financial reports in the prescribed format and on the required dates.

If your quote is successful, you will be required to enter into the Company's standard contract for the types of Services being provided. In the provision of the Services, you will be required to comply with the Company's policies, including (without limitation) its Business Partner Code of Conduct and any relevant Project Manual. Potential suppliers must also comply with the Company's Business Partner Code of Conduct in the submission of any quotes pursuant to this RFQ.

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 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.