

To: Offerors

Date: November 10, 2022

From: Procurement and Partnerships Team, INVEST Project; Implemented by DAI Global LLC

Subject: Request for Proposals (RFP) INVEST-114: USAID Georgia Promoting Georgian Exports

Due: **1:00PM EST on December 8, 2022**

Dear Offerors:

Enclosed is a Request for Proposals (RFP) to support the implementation of DAI's INVEST project funded by the United States Agency for International Development (USAID). DAI invites firms to submit a proposal for work as part of the USAID Georgia INVEST buy-in.

- I. RFP Process and deadlines:** This solicitation will result in the award of one Firm Fixed Price subcontracts. We anticipate issuing one subcontract not to exceed **\$475,000**.
- a. Submission of Questions – Questions must be submitted no later than **1:00 pm EST on November 17, 2022** via email to INVEST_Procurement@dai.com.
 - b. Submission of Proposals – Proposals must be submitted no later than **1:00 pm EST on December 8, 2022** via email to INVEST_Procurement@dai.com, copying [Danny Mannka@dai.com](mailto:Danny_Mannka@dai.com) and [Katherine Tilahun@dai.com](mailto:Katherine_Tilahun@dai.com). The subject line of the email should be your organization name, followed by “Submission under RFP INVEST-114 USAID Georgia Export Promotion.” Please certify in your submission email a validity period of 60 days for the price(s) provided. In order to submit a proposal, offerors must have at least initiated the process to obtain a [SAM UEID](#). If the UEID has not yet been issued, offerors should note that in the submission and update INVEST at INVEST_Procurement@dai.com once it is issued. Please limit file submissions to 10 megabytes or less.
- II. Composition of Proposal:** Your organization's proposal should comprise the following submission documents. The Technical Proposal and Cost Proposal should be prepared as separate files for independent evaluation, as follows. Technical proposals should be submitted as a slide deck presentation of no more than ten (10) slides with a minimum font size of 12, and graphics with a minimum font size of 10. Submissions in PowerPoint or in PDF are acceptable, although PDF is preferred along with an accompanying PowerPoint document. For submission of Part 1 – Technical Proposal, please submit a single combined PDF that includes the cover page, technical proposal, case studies, and CVs. Please provide a copy of your Cost Proposal in Excel format.

Part 1 – Technical Proposal

Please limit your technical proposal to no more than ten (10) slides. The technical proposal is composed of the following three (3) sections:

1. **Technical Approach** – Offerors will detail their approach to fulfill the accompanying Statement of Objectives (SOO). The approach will clearly indicate how the proposed activities will result in the successful achievement of the objectives as detailed in the statement of objectives and completion of all deliverables and milestones as proposed within the stated timeline.
2. **Institutional Capacity** – Offerors should provide details about the experience, networks, expertise, and/or capacity of their firm (or firms if a partnering arrangement is proposed) to implement the proposed approach and complete the work as described. This should also include past performance information for similar activities as those planned under this proposal and note any previous experience working as partners if a partnering arrangement is proposed.
3. **Management Plan/Staffing Structure** – Offerors should include details of personnel who might be assigned to the activities described in the technical approach along with their proposed roles and responsibilities, as well as a clear management plan in narrative form for the development, review, and submission of deliverables, including a milestone schedule that indicates their proposed timeline for implementation. Offerors are permitted to engage in partnering arrangements if it will aid in providing best value to USAID, regardless of whether organizations belong to the USAID Finance and Investment Network managed by INVEST. If a partnering arrangement is being proposed, please describe the nature of the arrangement, the specific technical value being contributed by each member of the team, and the appropriate management, oversight, and coordination controls to ensure successful delivery.

In addition to the above, please include the following. These inputs will not be counted as part of the 10-slide limit and the format may be PDF or Word:

- One (1) to two (2) examples of past performance relevant to this activity (limited to two (2) pages per example). Examples should be within the past five (5) years.
- CV(s) of any individuals proposed in the staffing plan to conduct this activity (limited to two (2) pages per individual)

NOTE: These inputs (past performance examples and CVs) will not be counted as part of the 10-slide limit and the format may be PDF or Word. A cover page will be considered a non-counting page, and offerors should include one and list on it the names of all firms participating in the bid. No additional annexes or documentation are requested at this time. **For submission of Part 1 – Technical Proposal, please submit a single combined PDF that includes the cover page, technical proposal, past performance examples, and CVs.**

Part 2 – Cost Proposal

The contract type for the presumptive contract will be Fixed Price, awarded by DAI Global, LLC. Please include your total proposed fixed price along with details for specific deliverable pricing. Offerors should also include a cost breakdown of the hourly rates for proposed personnel, if applicable, with a build-up to their total proposed price or

include substantiating price reasonableness documentation/justification. Cost breakdowns included will be utilized to determine price reasonableness. Offerors can use the attached cost/budget template for guidance, but are not required to use it, as long as the cost proposal captures the necessary elements (i.e. deliverables table with breakdown of how the deliverable totals were calculated). Note that the successful Offeror must be able to substantiate all costs and demonstrate the reasonableness of cost elements. Note that under Phase Two, INVEST expects the successful offeror to propose deliverables based on their technical approach that will result in a percentage of their total compensation tied to the successful transacting of \$5 million in deals with at least twenty-five (25) firms. INVEST anticipates that the successful offeror will propose a success fee structure that incentivizes deals transacted and demonstrates that the offeror's objectives are aligned with the interests of USAID/Georgia and Enterprise Georgia. Please limit file submissions to 10 megabytes or less.

III. Evaluation of Proposal: DAI will use best value determination for the award of this Request for Proposals. A best value determination means that, in DAI's estimation, the selected offer(s) will provide the greatest overall benefit to USAID in response to the requirements stated in this RFP. DAI may also exclude an offer from consideration if it determines that an Offeror is "not responsible", i.e., that it does not have the management and financial capabilities required to perform the work required. Proposals will be evaluated against a stated number of factors, including the overall proposed approach, past performance, specific qualifications in the identified sectors, and other evidence substantiating the bidder's ability to deliver, including budget and timeframe considerations.

1. Technical Proposal: The Technical Proposal will be scored and evaluated separately from the Cost Proposal. Technical panel reviewers will evaluate offerors on the following factors, consistent with the offerors' technical proposal. The Technical Proposal will be evaluated against the following criteria:

a. Technical Approach (30 points) – Points for this section will be awarded based on the information presented in the technical approach. The offeror will be scored based on its presentation of a clear and thoughtful approach which reflects the requirements of the Statement of Objectives (SOO) and incorporates the offeror's competencies. The technical approach should clearly set forth *how* offerors will achieve the core objectives of conducting a rapid assessment of up to 100 export-ready or near export-ready companies under Phase One and link 50 selected companies with international buyers to transact up to 25 deals totaling at least \$5 million under Phase Two. Offerors should state how they will gather the necessary information for Phase One (i.e. desk research, interviews, networks, etc.) and their approach for how they will transact at least 25 deals for selected companies in priority sectors in Phase Two.

b. Institutional Capacity (40 points) – Points for this section will be based on information presented in the corresponding section and any submitted past performance examples. Preference will be given to firms and/or consortia that have past performance in timely and successful delivery of similar services and/or relevant experience with export assessments in target markets and sectors,

and experience conducting detailed analysis of companies to improve export readiness and providing recommendations to target firms. Deep knowledge of target export markets and networks of relevant stakeholders in Georgia and the region are valuable. Offerors should demonstrate past experience identifying business leads, facilitating business to business meetings, and facilitating export agreements between businesses to drive exports.

- c. **Management Plan/Staffing Structure (30 points)** – Points for this section will be based on the qualifications of proposed staff, clear delineation of the roles and responsibilities of each proposed staff and each proposed firm (if firms are partnering), and the demonstrated efficacy and clarity of the management plan. Proposals will be scored based on the clarity of their management plan for the development, review, and submission of all associated deliverables, including a proposed milestone schedule, which outlines a timeline for completing Phase One and Phase Two, as well as a preliminary schedule for submission of deliverables. If the offeror is submitting a proposal along with partners, the proposal should describe the nature of the arrangement (i.e. added technical value), the division of labor among the partners, and the appropriate management, oversight and coordination measures to ensure successful delivery.

2. **Cost Proposal:** Cost and associated cost build-up will be evaluated separately from the technical approach, with due consideration for realism, price reasonableness, and allowability consistent with US government cost principles. Evaluation for this section will be dependent upon all information presented by the Offeror in their deliverable table, budget with cost breakdowns, and any relevant supporting cost information, as well as its alignment with the proposed technical approach.

IV. Offeror’s Agreement with Terms and Conditions: Please visit the [INVEST Procurement Hub](#) website (scroll down to “Terms and Conditions”) for RFP Terms and Conditions.

The completion of all RFP requirements in accordance with the instructions in this RFP and submission to DAI of the technical and price proposals will constitute an offer and indicate the Offeror’s agreement to the terms and conditions in this RFP and any attachments hereto. DAI is not required to accept and/or evaluate proposals that do not conform to the instructions of the RFP, and additionally, DAI may reject all proposals and not award a subcontract for this RFP. DAI reserves the right to award a subcontract without discussion and/or negotiation; however, DAI also reserves the right to conduct discussions and/or negotiations, which among other things may require an Offeror(s) to revise its proposal (technical and/or price). By submitting an offer, Offerors agree to comply with the general terms and conditions for an award, including Representations and Certifications compliance. Offerors must provide full, accurate, and complete information in response to this solicitation. By submitting an offer, Offerors certify that they have not/will not attempt to bribe or make any payment to DAI employees in return for preference. Issuance of this RFP in no way obligates DAI to award a subcontract, nor does it commit DAI to pay any costs incurred by the Offeror in preparing and submitting the proposal. DAI reserves the right to award a subcontract to one organization or to issue multiple awards to different organizations based on the results of our evaluation.

Thank you,

DAI INVEST Procurement and Partnerships Team

INVEST_Procurement@dai.com

Statement of Objectives under RFP INVEST-114: USAID Georgia Promoting Georgian Exports

Introduction

The United States Agency for International Development (USAID) recognizes that as the world's development challenges become more complex, many can only be solved through market-based solutions.

Increasingly, private investors and businesses are looking at emerging markets for new opportunities. However, investing in these markets is complex, and USAID has an important role to play in mobilizing investment into high-impact areas.

Encouraging these investments requires new forms of collaboration. In September of 2017 through a contract awarded to DAI, USAID set up the INVEST mechanism to build and engage a network of partner organizations with valuable investment and finance expertise, including those that have not worked extensively with USAID in the past.

[INVEST](#) enables USAID Missions, Bureaus, and Independent Offices to quickly access niche expertise from this diverse network of partner organizations. These partners work alongside USAID to deliver customized financing solutions that address investment constraints, mobilize additional private capital, and produce development results for a variety of sectors and geographies.

INVEST pairs innovative technical approaches with streamlined and user-friendly procurement and subcontracting processes. These simplified processes level the playing field, ensuring that USAID can work with the best firm for the job, regardless of that firm's size, locality, or previous experience with government contracting.

Background & Purpose

Through INVEST, USAID/Georgia seeks to support Georgian businesses to diversify into new international export markets, helping to drive quality job creation and reduce dependence on the Russian and Chinese markets, especially given the unrest caused by Russia's war in Ukraine and Georgia's heavy reliance on both countries as export markets; in 2021, one-third of all Georgian exports were destined for Russia and China. Strengthening export linkages with the European Union (EU) and other high value markets is an important part of Georgia's path toward Euro-Atlantic integration. The 2014 EU-Georgia Association Agreement reduces tariffs and removes technical barriers for Georgian exports, improving access to the EU market for Georgian companies. The Georgia - Turkey Free Trade Agreement and the Diagonal Cumulation Treaty with Turkey provide additional opportunities for increased trade. However, Georgian companies need support in meeting international standards, identifying buyers abroad, and transacting deals. Promoting Georgian products in high-value markets requires new forms of collaboration between Georgia's businesses, USAID, the Government of Georgia, and international buyers.

To promote export diversification in non-agricultural sectors, USAID/Georgia intends to support Enterprise Georgia, a legal entity under the Ministry of Economy and Sustainable Development, by providing export facilitation services between the Government of Georgia, Georgian enterprises, and international buyers.

Enterprise Georgia is a government agency operating under the Ministry of Economy and Sustainable Development of Georgia. The agency focuses on economic development through increasing the competitiveness of the private sector, enhancing the country's export potential, and promoting/supporting foreign direct investments (FDI) into Georgia. Its mission is to support achievement of the Government's long-term strategic goals for the Georgian economy through three major divisions: Business; Investment; and Export.

Enterprise Georgia's Export Division supports businesses' participation in international exhibitions and trade missions. Support for international exhibitions includes coordinating, organizing and co-financing business to business (B2B) exhibitions, helping Georgia-based companies make new business connections, identify potential partners, diversify production, and penetrate new export markets. Support for trade missions includes connecting foreign buyers with Georgian businesses, registering companies on www.tradewithgeorgia.com, ensuring documentation and international certifications are in order, and increasing the professional capacity of export managers within Georgia. Enterprise Georgia's priority non-agricultural export sectors include apparel, packaging, toys, pet food, furniture, and electronic equipment and devices (i.e. solar panels).

As stated above, export revenues comprise one of the most important sources of foreign currency and economic growth in Georgia (43.1% of GDP in 2021). Russia's war in Ukraine has highlighted the dangers of heavy economic reliance on malign external actors. Georgia is at particular risk given its geographic location, small domestic market size, and dependence on Russia given Russia's track record of politicizing trade. Georgia's exports to Russia and China are concentrated in selected commodities such as beverages and spirits, iron and steel, and fruit which accounted for 80% of Georgia's exports to Russia. Furthermore, mineral ores alone made up almost 90% of Georgia's exports to China.

The war in Ukraine highlights the need to bolster Georgia's economic independence from Russia, and USAID has historically prioritized European and other alternative markets. In this light, Enterprise Georgia sees this moment as an opportunity to diversify the country's export structure and markets.

Objectives and Activities

The selected firm(s) will be issued a firm-fixed price subcontract from INVEST to fulfill a two-phase activity to support USAID/Georgia and Enterprise Georgia. Phase One consists of conducting a rapid assessment of up to 100 export-ready or near export-ready companies (in accordance with pre-agreed criteria identified by Enterprise Georgia in priority target markets). In the second phase, the successful Offeror will link 50 selected companies out of the 100 with international buyers and transact up to 25 deals. Please see below for details on

the two phases. Offerors should provide an estimated timeline of how long each phase will take to implement within the overall 16-month period of performance.

Phase I: Rapid Assessment and Prioritization of Georgian Companies and Export Markets

The selected firm will work with Enterprise Georgia to review the companies previously identified by Enterprise Georgia and outline the engagement status and next steps. This includes:

- Assess and prioritize companies:
 - Establish the core criteria for selecting Georgian companies, which may include but is not limited to export readiness (i.e. international certifications), export volume, potential for job creation, etc. The selection criteria must allow for the inclusion of companies led/owned by women or persons representing disadvantaged communities.
 - Conduct a more detailed assessment of each company identified, providing information on export readiness, volume, target export market(s), etc. and the recommendations moving forward.
 - Companies should be selected from Enterprise Georgia's priority sectors mentioned above; new sectors may be proposed for consideration with corresponding justification and approval from Enterprise Georgia and USAID/Georgia.
 - In coordination with Enterprise Georgia, categorize companies on three different levels: high potential (strong company with experience), moderate potential (quality company with limited experience or other constraints), beginner (start-up or early stage of development). Then select 10, 20, and 20 companies respectively that have the most opportunity for export diversification, applying the criteria and developing recommendations. For the top prioritized 50 companies, present the opportunities and next steps to INVEST, Enterprise Georgia, and USAID/Georgia for their concurrence.
- Assessment and prioritization of Georgian export markets
 - In coordination with Enterprise Georgia, gather historical export data, country-specific certification and/or export requirements, market intelligence, including current trends, and other information related to export requirements and potential niches in target markets and sectors/ sub-sectors.
 - Assess and prioritize at least three (3) target export markets (new or existing) with the highest potential for new deals in the selected sectors/sub-sectors, to be approved by Enterprise Georgia and USAID/Georgia.
- Reporting
 - Provide brief monthly reports on progress, challenges, milestones and overall performance to USAID/Georgia, Enterprise Georgia and, as requested, the Ministry of Economy and Sustainable Development, which oversees Enterprise Georgia.
 - Track and report on activities/engagement with prioritized companies and provide regular updates.

Phase 2: Export Facilitation Services

Export facilitation services will be tailored to help promote Georgian exports in targeted sectors, with a particular focus on companies with high potential for diversification of export markets. Based on the rapid assessment and documents gathered in Phase 1, the selected firm(s) will:

- Develop a tailored marketing package for each Phase One selected company according to the tier that they have been assigned through initial vetting. The package will include relevant data and information and that is aligned with the expectations of the export market(s).
- Coordinate with Enterprise Georgia and expand on efforts to identify qualified leads in each prioritized sector and establish connections between selected companies and buyers in target markets (including support to connect companies with potential buyers during exhibitions and/or events supported by Enterprise Georgia).
- Compile detailed market research and market intelligence on target sectors/sub-sectors in identified target markets that can be easily updated on a regular basis (i.e. quarterly); market intelligence should be compiled into easy-to-digest formats that help companies make data driven decisions using the most up-to-date information
- Support 50 selected companies in preparation of relevant materials for presentations, meetings, and negotiations with international buyers.
- Facilitate communication and information requirements leading to deal close.
- Provide evidence of 25 successful deal transactions (contract signed by each party confirming export of the product[s] will take place) totaling at least \$5 million.

Illustrative Deliverables & Milestones

Illustrative deliverables are listed below, however, offerors should propose deliverables in line with their approach while meeting the objectives outlined in this SOO. Deliverables will be submitted for review and approval in English.

The following illustrative deliverables will be developed and presented under this buy-in:

- Assessment and prioritization of 50 selected Georgian companies according to the agreed selection criteria
- Assessment and prioritization of three (3) export markets, including country-specific certifications, requirements, and other market intelligence
- Development of tailored export plans and marketing materials with selected companies
- Activity Monitoring, Evaluation, and Learning Plan
- Monthly Progress Reports to include indicator achievement updates, progress on deal transactions, and success stories.
- \$5 million in deals transacted (per definition above) with at least twenty-five 25 selected companies in at least four (4) different sectors, with at least two (2) companies gaining a deal in each sector; supported with corresponding evidence. Pay for performance/success fees for this portion of the work is expected. For performance-based payments, INVEST expects the successful offeror to propose deliverables based

on their technical approach that will result in a percentage of their total compensation tied to the successful transacting of \$5 million in deals with at least twenty-five (25) firms. INVEST anticipates that the successful offeror will propose a success fee structure that incentivizes deals transacted and demonstrates that the offeror's objectives are aligned with the interests of USAID/Georgia and Enterprise Georgia.

Upon selection and award, INVEST will work closely with the awardee(s) to determine the contract structure including final timelines, deliverables, and associated costs. Payment will be made upon completion of deliverables, and payment such as deal consideration and deal closure under Phase Two is expected to be on a prorated success fee basis as outlined above. Regular updates will be presented to USAID/Georgia, Enterprise Georgia, and INVEST on progress and status of work by the subcontractor. The subcontract will be a firm-fixed price agreement that is based on the completion of deliverables.

Role of INVEST and Implementation Structure

INVEST will work closely with the selected subcontractor during all stages of this work. DAI will subcontract the selected offeror directly and provide review and oversight throughout the life of the activity in accordance with INVEST's management approach. The INVEST team will administer periodic check-ins, reporting, deliverable review prior to client presentation and approval, and manage the subcontract governing the activity and oversee the work of the successful offeror(s).

- *Subcontractor Onboarding:* INVEST will provide the successful offeror(s) with all necessary context to implement the activity, request all necessary contractual inputs to negotiate and sign the subcontract, and coordinate all communications between USAID/Georgia, Enterprise Georgia, and the successful offeror and work with the successful offeror(s) to develop work plan(s), as necessary.
- *Project Implementation:* The selected subcontractor(s) will implement the work as prescribed by the work plan(s) (as needed) and agreed upon subcontract Statement of Work and deliverable schedule. INVEST will provide management support and conduct periodic check-ins/reporting as well as coordinate all communications between USAID, Enterprise Georgia, and the successful offeror(s).
- *Ongoing Monitoring, Evaluation, and Learning:* INVEST will define indicators during the subcontracting process, collect and review M&E data from subcontractor(s) for requisite reporting to USAID and will conduct data quality assessments as necessary. Illustrative indicators could include:
 - Financial Additionality
 - Number of deals identified and facilitated by INVEST activities.
 - Return on investment for international trade shows.
 - Value and share of exports going to target markets/ Value of investment facilitated in target sectors (IR 3.2-4)
 - Value of sales of target enterprises (domestic and exports) (IR 3.2-5)
 - Development Additionality
 - Value (\$) of non-donor resources mobilized for local development priorities (CBLD-10)

- Number of USG-facilitated trade relationships within strategic markets/countries
- Number of employment opportunities created by deals facilitated by INVEST, disaggregated by gender
- Amount of funds allocated/expended by Enterprise Georgia for export facilitation.
- Number of analytical pieces (sectoral studies, value propositions, etc.) contributed by Enterprise Georgia.

Period and Place of Performance

The activities outlined above are estimated to take place over a sixteen (16) month period from approximately January 2023 to June 2024. Offerors are free to propose an implementation timeframe within that range that best aligns with their technical approach but must be clear about how long each phase will take to complete.

There will be significant interaction between the selected offeror(s) and Enterprise Georgia and selected companies, as well as interactions with INVEST and USAID staff. Offeror(s) are expected to propose a hybrid approach for remote research with potential travel to Georgia and throughout the EU and/or other selected target markets for meetings with prospective buyers and include the corresponding costs, as appropriate.