



*Accelerating the **Business of Technology**.*

Request for Proposals

*Navalshore 2013
Trade & Partnering Opportunities Initiative*

Rio de Janeiro, Brazil August
13 – 15th, 2013

RFP for the Provision of
Consulting/Matchmaking Services

Date: May 14, 2013

INTRODUCTION

The Newfoundland and Labrador Association of Technology Industries (NATI), in partnership with the Government of Newfoundland and Labrador (NL) and the Atlantic Canada Opportunities Agency (ACOA), will lead a provincial mission to Navalshore 2013 in Rio de Janeiro, Brazil, August 13th to 15th, 2013. This initiative will consist of three (3) days of scheduled business-to-business meetings, with optional follow up after care services for participating companies.

BACKGROUND

The Navalshore initiative will be led by NATI. NATI is the voice of the advanced technology sector for our province. Since its inception in 1991, NATI has experienced steady growth and heightened recognition. NATI is an energetic, focused and forward-looking force that is accelerating the business of technology in NL. NATI is an industry leader in developing export opportunities, and has directed numerous companies on business initiatives and trade missions to international markets where there is a strong sales potential.

NATI will work closely with our partner organization, OceansAdvance (OA), as the delegation will be mainly comprised of companies who are members of both associations. NATI and OA has worked together on similar initiatives in the past, with OA providing strategy and vision for the ocean technology sector, with NATI providing the business to business guidance required for international business development.

PURPOSE

The fundamental objective of this initiative is to provide each participating NL delegate with an opportunity to meet a number of pre-qualified potential customers, partners, agents, distributors and other key industry contacts in the Ocean Technologies sector.

PROJECT ELEMENTS

Representatives from NATI, the Government of Newfoundland and Labrador, and ACOA, referred to as the Project Committee, will coordinate company recruitment and provide one (1) shared exhibition booth space and dedicated meeting space within the Navalshore Exhibition Hall over the three (3) days of Navalshore 2013. It is expected that six (6) to eight (8) companies and organizations from Newfoundland and Labrador will participate in this initiative.

The project will consist of:

- **A review of profiles** supplied by the participating firms/organizations;
- **Consultation with company officials** to ensure that their meetings objectives are clearly understood;
- **Undertaking a systematic prospecting campaign** on behalf of each delegate to ensure optimal value from their attendance at Navalshore 2013, and to schedule **a minimum of 6 meetings**;
- **In partnership with the project lead(s), coordinating the logistics** associated with three (3) days of business- to-business meetings;
- **Participating with the delegation** as part of the NL sponsored exhibition booth space during the Navalshore conference;
- **Preparing a detailed mission summary report** within sixty (60) days of completion of project reporting on the individual company/organization results; and
- **Providing aftercare services** for the participating companies and organizations as required.

STATEMENT OF WORK AND DELIVERABLES

The consultant(s) will be expected to conference call with each of the participating delegates prior to the mission, arrange suitable meetings during the mission, and provide aftercare services following the mission.

Specifically, as per the RFP, the contracted consultant(s) will:

- Assist 6 - 8 NL companies and organizations in preparing for Navalshore 2013;
- Prior to the mission the consultant will conference call with the confirmed NL mission participants to discuss one-on-one each company or organization's products and/or services, their objectives and targets for the mission, along with any other relevant information needed to assist the consultant in providing matchmaking services. This will require further contact with the companies by phone, fax and email on a regular basis to seek clarification on the products/services and market interests to match with potential business partners;
- Work closely with the participating NL companies and organizations, and the mission lead(s) throughout the pre-mission period, to ensure that goals are being met and any issues are being resolved;
- The consultant will hold weekly conference calls with each participating company or organization to learn about their products and services, and their goals for the conference;
- Regular email touch points and bi-weekly conference calls will be conducted with NATI's Business Development Executive and representatives of the Government of Newfoundland and Labrador, and ACOA, to ensure the consultant, companies and organizations are aligned, and that the meetings proposed are within the parameters set. A bi-weekly update will also be sent to the project stakeholders following these calls;
- Identify potential Latin and South American-based or international businesses or delegates attending Navalshore 2013 for potential partnerships with the participating NL companies, based upon criteria established through corporate company profiles and in-person meetings;

- Schedule and coordinate business meetings. A **minimum of six (6) meetings**, for each of the participating delegates, will be required;
- If two or more NL delegates ***with competing interest*** are to meet with the same company, the NL delegates and Project Lead(s) are to be notified and concurrence received prior to these meetings being confirmed;
- Pre-qualified scheduled meetings are to meet the objectives of the NL companies and overall delegation, and hence, the quality of matches is crucial;
- Provide mission lead(s) with a short status report on a weekly basis by email commencing at the end of the first week of the contract start date up until the mission date. Reports must include specific information with regard to work undertaken, contacts made with the NL companies and organizations, contacts made on the delegate's behalf, matches arranged etc.;
- Provide participant companies, organizations and mission lead(s) with an individual agenda, including a detailed profile on each of the potential Latin and South American or other internationally-based businesses at Navalshore with which they will be meeting. The profile is to include a web site, company address, and company brochure or written description of the firm and its products or services. This information should be provided to the NL firms well in advance of the mission;
- Provide to mission lead(s) and to the NL companies and organizations details of 50% of all pre-approved matchmaking appointments for each company by August 01st, 2013. The complete list of matchmaking appointments is to be provided to each participating company and the appropriate mission lead(s) by August 7th, 2013, and should include company address, phone, fax, e-mail, contact and

website address;

- Participate in the mission to facilitate the daily business program on-site at Navalshore, including being available to provide on-site consultation and troubleshooting to NL representatives as needed;
- The Consultant will be required to provide minor translation services for meetings onsite at Navalshore for the NL companies and organizations where required;
- Provide after-care services for up to 6 months after the conference, for those companies and organizations who select this option upon mission registration; The selected consultant will be utilized for 3 days monthly for the length of the contract (*unused monthly hours to roll-over to future months within the contract period*).

Examples of activities include, but are not limited to:

- ✓ Target competitive intelligence for firms in Newfoundland and Labrador in the identified sectors;
 - ✓ Attendance at, and assessment of, industry events, networking luncheons, trade shows, conferences, etc. Consultant to submit formal recommendations and action items related to such events to the NATI Brazil working group;
 - ✓ Targeted market research to be conducted for the NATI Brazil working group and NL SMEs, outlining opportunities in the Rio de Janeiro and Sao Paulo areas, in the identified sectors;
 - ✓ Supporting promotion activities in-market;
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- Within 30 calendar days after the conclusion of the mission, provide mission lead(s) with the final list of potential Latin and South American-based or international delegates with which the NL companies actually met, including name of contact person and complete address;

- Within 60 days after the conclusion of the mission, provide mission lead(s) a final report summarizing the matchmaker's activities, including post-mission recommendations/results for each participating NL company or organization.

TIME LINE

Action	Delivery Date	Responsibility
Final Date for Participant's Mission Application	May 31st, 2013	Project Lead(s)
Evaluation of Potential Delegates for Mission	June 07 th , 2013	Project Lead(s)
Mentoring/Matchmaking Update	Weekly	Consultant
Provide 50% of Matched Appointments	8 working days prior to start of Navalshore 2013	Consultant
Provide Complete list of Matched Appointments and Detailed Profiles for each Company Meeting with the NL Companies	5 working days prior to start of Navalshore 2013	Consultant
Participate Onsite at Navalshore 2013 to Provide Support & Facilitate the Project	August 13 th - 15 th , 2013	Consultant Project Committee Project Lead(s)
Submit Final Report and Complete List of meetings	October 15 th , 2013	Consultant

BUDGET

- Please include any consultant personal expenses, including ground transportation, and administration expenses in submitted proposals – faxes, mailings, telephone, etc. (The booth space and meeting room costs will be covered by NATI; participating companies are responsible to pay their own travel and accommodation costs).
- For budgeting purposes, the contractor should develop and present its fee schedule on a per-company/organization basis. It is expected that 6-8 companies and organizations will be recruited for the initiative, but NATI reserves the right to scale the contract value to the number of companies who will actually participate in this initiative, based on the submitted cost per each company or organization quoted.

SELECTION CRITERIA

The successful candidate will be determined based upon the following:

- The extent of knowledge and experience in relation to the proposed work;
- Network of contacts within the Ocean Technology and Advanced Technology sectors and the business community in Latin and South America;
- Evidence of Ocean Technology specific networks and partnerships in Latin and South America;
- Demonstrated Knowledge of the NL Ocean Technology Sector;
- An understanding of the scope and objectives of the proposal;
- Proposed approach, work plan and schedule; and
- Cost*.

* Determination of best value may not result in the lowest cost being accepted.

BUDGET

Payment will be made upon the consultant submitting electronic invoices with supporting documentation in a form satisfactory to NATI.

Payment schedule as follows:

- 50% due within 30 days of contract signing;
- 25% upon submission of final matchmaking schedule; and
- 25% holdback paid upon satisfactory completion of the project. Failure to meet any of the conditions outlined in the contract will result in adjustment to final payment/holdback;
- Payment of invoices will take place in **Canadian Dollars** within thirty (30) days of receipt.

VALUATION FACTORS

1) Project Management

This area includes professional qualifications and experience of key personnel assigned to this project, track record, and experience in business development, familiarity of federal and provincial trade and business responsibilities in both Canada and Latin and South America, and network of contacts within the Latin and South American business community.

2) Project Team

This area includes professional qualifications of key project members, their experience and network of contacts within the Ocean and Advanced Technologies sectors.

3) Comprehension

This area includes understanding of the scope and objectives of the proposal, the approach proposed, the work plan and schedule, identification of potential problems and recommendation of possible solutions, etc.

PROPOSAL REQUIREMENTS

- Proposals must include a company prospectus, services offered and details on the qualifications of the firm, including previous experience in similar type work, sector knowledge and network of contacts in the market;
- Proposals must include details on the background and experience of qualified personnel relating to the project management and project team;
- Proposals should include names of former clients and associates for whom similar or relevant work has been performed presented as references, as well as a description of the work completed (minimum of 3

references required); and

- Proposals must identify other major projects committed to by the consultant(s), between project start date and Navalshore 2013.

NATI is not obliged to accept the proposal with the lowest price or any other proposal for this project. NATI reserves the right, upon 10 days written notice, to terminate these services and the work contemplated in this proposal, at any time.

INQUIRIES

Inquiries may be directed to:

Natasha Hudson natasha@nati.net

Tel. (709) 757-3253

No payments will be made for costs incurred in the preparation and submission of a proposal in response to this request.

Please submit one copy of your Proposal clearly marked:

Navalshore 2013
Trade & Partnering Opportunities Initiative
August 13th – 15th, 2013

Must be received (email or fax) no later than 12:00 p.m. (noon) NST on Friday, May 31st, 2013 submitted to:

Attention: Natasha Hudson
NATI – NL Association of Technology Industries
391 Empire Ave, Suite 5
St. John's, NL
Canada
A1E 1W6
Email: natasha@nati.net
Fax: (709) 757-6284

Evaluation Criteria

EVALUATION OVERVIEW/CONSULTANT SELECTION METHODOLOGY

Evaluation Procedures

Proposals will be assessed based on the criteria specified.

The clauses of this section of the RFP are categorized as "Mandatory" or "Rated" Requirements. Mandatory items are identified specifically with the word "MANDATORY".

- a) **To be considered responsive, a bid must meet all the mandatory requirements of this solicitation. Bids not meeting all mandatory requirements of this solicitation will be given no further consideration.**
- b) The bids meeting all the mandatory requirements of this solicitation will be subject to a point rating evaluation, as follows:

To be considered responsive, a bid must obtain the required minimum of 60 percent of the points for each of the criteria categories, which are subject to point rating, specified in this solicitation document. The technical rating is performed on a scale of 100 points. Bids not obtaining the required minimum percent for each category of technical criteria which are subject to point rating will be given no further consideration.

MANDATORY REQUIREMENTS

1. Bidder **MUST** submit a company profile with their proposal, including résumés and roles of all personnel who will be participating in the project.
2. Bidder **MUST** provide a list of similar work projects undertaken in the past three years (3) and substantiate that the firm has gained technology development and commercialization experience through these projects, as well as any international marketing and competitive market analysis experience.
3. Bidder **MUST** demonstrate a minimum of three (3) years' experience working with companies, universities or other associations in the area of Ocean Technologies, as well as working with international governments in Trade Development.

RATED REQUIREMENTS (Maximum 100 points, Minimum 60 points)

Criteria	Value	Score
Significant knowledge of opportunities in the Latin and South American market and the Ocean Technologies sectors Note 1: Significant knowledge is defined by breadth and depth of knowledge Note 2: Must score at least 15/20	20	
Understanding of market business practices and culture, learned through direct business experience	10	
Demonstrated network of contacts within the Ocean Technologies sectors	20	
Demonstrated ability to successfully coordinate trade missions	10	
Quality of Proposal		
Demonstrated understanding of the Project, its objectives and metrics for evaluation	10	
Completeness and suitability of approach	10	
Recognition of conflicts of interest and any problems, and creativity of solutions offered	5	
Identification of in-market partners to complete the project	5	
Layout, organization and readability of proposal	5	
Cost **(in Canadian Dollars)	5	
TOTAL	100	