

Request for Proposals (Tender ID No. TR2018-19-02)

For Matchmaking and Organizational Services:

Germany

September 4-7, 2018

For

Nova Scotia Business Incorporated

Request for Proposals Issue Date: Tuesday, May 29, 2018

Responses to this Request for Proposals must be received at the office of:

Nova Scotia Business Inc.

1800 Argyle Street

Suite 701

Halifax, Nova Scotia

B3J 3N8

No later than 12:00 pm AST on Friday, June 29, 2018

A Consultant's Meeting may be required

Email bids **will** be accepted for this Request for Proposals

Facsimile bids **will not** be accepted to this Request for Proposals

At a minimum, the terms & conditions and supplements listed below apply to this procurement. These documents are available from the Procurement website as show below.

By submitting your response to this Request for Proposals, you acknowledge that you have read and complied with these documents.

Atlantic Standard Terms and Conditions and Supplement Request for Proposals.

These documents are available from <http://novascotia.ca/tenders/policies-processes/terms-and-conditions.aspx>

Table of Contents

OBJECTIVE.....	4
1.0 PROJECT BACKGROUND.....	4
2.0 SCOPE OF SERVICES REQUIRED.....	4
3.0 PROJECT ELEMENTS AND DELIVERABLES.....	5
4.0 SCHEDULE	6
5.0 PROPOSAL SUBMISSION.....	6
5.1 Submission Requirements.....	6
5.2 Proposal Format.....	6
5.3 Copies Required	7
5.4 Enquiry Contacts/Project Management	7
5.5 Proposal Changes and Amendments	7
5.6 Closing Date	8
5.7 Late Proposals	8
5.8 Changes to Proposal Wording.....	8
6.0 GENERAL INSTRUCTIONS.....	8
6.1 Eligibility	8
6.2 Consultant's Expenses.....	9
6.3 Grounds for Disqualification	9
6.4 Firm Pricing.....	9
6.5 Currency and Taxes.....	9
6.6 Subcontracting	9
6.7 Interviews.....	9
6.8 Obligation.....	9
6.9 Definition of Contract.....	9
6.10 Liability for Errors	10
6.11 Acceptance of Terms	10
6.12 Special Conditions.....	10
6.13 Financial Stability	10
6.14 Ownership of Proposals and Freedom of Information.....	10
6.15 Use of Request for Proposals.....	10
6.16 Confidentiality of Information	10
6.17 Reciprocity	11

7.0 CONTRACT CLAUSES	11
7.1 Registration of Workers' Compensation Board	11
7.2 Indemnity	11
7.3 Insurance	11
7.4 Contract Administrator.....	11
7.5 Compliance with Laws.....	12
8.0 EVALUATION PROCESS.....	12
8.1 Selection Criteria.....	12
8.2 Criteria Scoring	13
9.0 BUDGET.....	14
10.0 PAYMENT SCHEDULE	14

OBJECTIVE

With more than 850 companies in the province exporting products and services around the world, Nova Scotia has already developed a solid reputation for producing high-quality products and services for international markets. The mission of Nova Scotia Business Inc. (NSBI) is to drive a strong, prosperous and globally competitive Nova Scotia through business development. Trade mission destinations are based on traditional, diversification and emerging markets. Trade mission participants are taken into an identified market and provided with an itinerary including business meetings and networking opportunities.

1.0 PROJECT BACKGROUND

The Atlantic Canada Opportunities Agency (ACOA) and Nova Scotia Business Inc. (NSBI) are coordinating a trade mission to Hamburg, Germany for Ocean Technology companies.

This business-to-business initiative will take place in conjunction with SMM-Hamburg where participating companies will have the opportunity to walk the floor and speak with potential customers. Business-to-business meetings will be scheduled throughout the week outside of SMM-Hamburg and shall consist of three days of scheduled business-to-business (“B2B”) meetings.

The objective of the project for our Atlantic Canadian companies will differ depending on the product or service but will include identifying potential customers which could mean direct sales, inclusion on bid lists, and/or opportunities to provide procurement quotes. The consultant’s role will be to provide each participating Company delegate with the opportunity to meet with pre-qualified contacts in the region while benefiting from the exposure created by a trade mission.

This Request for Proposals is being issued by Nova Scotia Business Inc., referred to in this document as NSBI. ACOA and NSBI will lead the recruitment of company delegates, receive company applications, screen and approve applicants and determine the best fit for the companies on the trade mission. This trade mission will only proceed on the recruitment of a minimum of seven (7) to a maximum of ten (10) Atlantic Canadian companies.

2.0 SCOPE OF SERVICES REQUIRED

- Business matchmaking for up to ten (10) Atlantic Canadian companies participating on the trade mission.
- Each company registered for the business-to-business mission will have a minimum of six (6) pre-qualified meetings with prospective clients and partners in Hamburg, Germany and surrounding area unless it is agreed upon in writing between the Company and the Consultant that a minimum of less than six (6) meetings, but no less than four (4) meetings, is acceptable, if due to the logistics of travelling to the location of the respective meeting(s) and/or the time commitment required for a given priority meeting(s), that participating in six meetings is not physically possible during the time period of the mission.

- Company consultation in advance of the trade mission to understand the delegates' goals and objectives in Germany.
- Creation of a master document tracking all meetings, including time, place, and all pertinent contact information. The master document will be supplied to mission delegates as well as ACOA and NSBI.
- Provide support in-market during the trade mission. It is imperative that the lead matchmaker be on-site with the delegation in Hamburg, Germany from September 4th – 7th, 2018.
- Identification of conflicts of interest and addressing these conflicts to the satisfaction of ACOA and NSBI. This could include situations arising from two or more mission delegates exporting competing products or services, especially when scheduled to meet with the same buyers or partners in market.
- Coordinate an information session with delegates in Hamburg. If applicable, cost of venue, catering, etc., will be paid by the Consultant and billed at cost to ACOA and NSBI.
- Participation in a mission debriefing session for mission delegates following the mission.
- Coordination of logistics, including hotel recommendations and ground transportation. The cost of ground transportation will be paid by the Consultant and reimbursable at cost (with receipt) by ACOA and NSBI. Companies will be responsible for all costs associated with hotel accommodations, meals, incidentals and air travel.

3.0 PROJECT ELEMENTS AND DELIVERABLES

The consultant's role will consist of:

- Thorough review and revision of the profiles of approved mission delegates.
- Consultation with mission delegates to ensure that capabilities, capacities and objectives are clearly understood.
- A systematic prospecting campaign on behalf of each mission delegate to schedule a minimum of six (6) business-to-business meetings with qualified prospects over a four-day period of the trade mission.
- In advance of the mission, provide weekly updates to ACOA and NSBI by telephone, email or in person on the status of the matchmaking and any challenges which may arise.
- The consultant will seek permission from ACOA and NSBI prior to any consultation with any Global Affairs Canada officials in Germany.
- Provide mission delegates with profiles of the organizations with whom they will be meeting in advance of the mission (to include website, address, contact, brief company profile).
- Individual meeting schedules **must** be provided to mission delegates, ACOA and NSBI at least seven (7) days prior to their departure.
- Country specific market intelligence and mission briefings. To be delivered ahead of departure via phone call, webinar and/or email.
- In-country briefing upon arrival to prepare the mission delegates for their meetings.
- Coordinate the logistics associated with the mission, including coordinating hotel recommendations and ground transportation as well as contributing to the guest lists for any in-market receptions.
- Post-mission follow-up with mission delegates (group meeting) to debrief on mission experiences and suggestions for future initiatives.

- A final matchmaking report is due within thirty (30) days of the completion of the mission.

4.0 SCHEDULE

The consultant will begin work immediately upon approval to proceed. The expected completion date is October 19, 2018 (based on receipt of final report).

5.0 PROPOSAL SUBMISSION

5.1 Submission Requirements

Submission procedures are to be followed by all consultants. Consultants are cautioned to carefully read and follow the procedures required by this Request for Proposals, as any deviation from these requirements may be cause for rejection of the submission. The proposal must be signed by the person(s) authorized to sign on behalf of the consultant and to bind the consultant to statements made in response to this Request for Proposals.

5.2 Proposal Format

The proposal should include the following:

- Introduction to the consultant including primary focus of business, services offered, and client base.
- Background and experience of all qualified personnel relating to the project management and project team.
- Identification of the consultant's capabilities across multiple sectors as it is expected there will be significant diversity in the group of participating companies.
- Clear identification of the lead consultant including their role and scope of work. Up to date Curriculum Vitae is required to determine if knowledge and experience requirement are met.
- Clear identification of any subcontractors including their role and scope of work. Up to date Curriculum Vitae are required for all subcontractors.
- Outline of how services for the mission will be delivered, including the management of communications with ACOA and NSBI, delegate companies, and target market contacts.
- Methodology for identifying key prospects for delegate companies.
- Identification of potential challenges anticipated for the trade mission and potential strategies to overcome these challenges.
- Outline of a strategy to coordinate logistics as well as identification of any key logistics service providers required in-market.
- Names of former clients for whom similar or relevant work has been performed should be presented as references, such as a description of the work completed including the results achieved.
- Detailed project work plan with associated timelines and deliverables.
- Detailed project budget. Please include in your quotation any administration expenses – faxes, mailings, telephone, etc.; participants are responsible to pay their own

travel/accommodation costs). For budgeting purposes, **the consultant must develop and present its fee schedule on a per-company basis. Final contract price will be determined by number of companies participating.** It is expected that between seven (7) to ten (10) Atlantic Canadian companies will be recruited for the mission.

- As the consultant is required to be on-site during the mission, please submit estimated cost of travel.
- Selection will be based on the capabilities and experience of the project team, adherence to terms of reference and cost.
- Proposals may be submitted electronically in a .pdf version only as one document including all annexes and appendixes and does not exceed a total of 30 pages.

The consultant must disclose all major activities that they have contracted to occur within the two-month period prior to the mission and one month subsequent. Any subsequent commitments made after the award of the contract are to be disclosed to ACOA and NSBI at that time. Disclosure will not result in disqualification of the consultant.

5.3 Copies Required

If submitting paper proposals, an original hardcopy and one photocopy of all documents are required. The original shall be left unbound, and clearly marked ORIGINAL on the title page and all copies shall be clearly marked COPY on the title page. One of the copies must be left unbound. The original will be retained by NSBI as the official record of submissions received. The original and all copies must be identical. In the event of any discrepancy the document marked original will be deemed to be correct.

5.4 Enquiry Contacts/Project Management

Consultants requiring further information on this Request for Proposals should contact:

Shauna Cotie

Export Development Executive
Nova Scotia Business Inc.
1800 Argyle Street, Suite 701
PO Box 2374
Halifax, NS B3J 3E4
Telephone: +1 (902) 424-1260
Email: scotie@nsbi.ca

Doug Phelan

Manager | International Business Development
Atlantic Canada Opportunities Agency
1800 Hollis Street, Suite 600
PO Box 2284, Station M
Halifax, NS B3J 3C8
Telephone: +1 (902) 426-9065
Email: doug.phelan@canada.ca

These persons shall act as the project managers and will be the main contacts to ensure consistent access to all information required to respond to the Request for Proposals. They shall also ensure the successful consultant receives all information required to fulfill the contract. Any information obtained from other sources is not official and may be inaccurate.

5.5 Proposal Changes and Amendments

Any changes made to the Request for Proposals or any appendixes or any change in the closing date or time will be posted and it is the sole responsibility of any consultant to monitor and check for changes. When these changes occur within five (5) government business days

of the close of the proposal, the scheduled closing date may be extended to allow for a suitable number of proposal preparation days between the closing date and the issuance of the change.

5.6 Closing Date

All proposals and required copies of the proposal must be received by 12:00 pm AST on Friday, June 29, 2018

Mailing Address

Nova Scotia Business Inc.
PO Box 2374
Halifax, NS B3J 3E4
Attention: Shauna Cotie

Street Address

Nova Scotia Business Inc.
1800 Argyle Street, Suite 701
Halifax, NS B3J 3E4
Attention: Shauna Cotie

Proposals and their envelopes should be clearly marked with the name and address of the consultant, and the project or program title. Proposals should be submitted in English.

Proposals may be submitted by email in a .pdf version only to scotie@nsbi.ca. Proposals should be submitted electronically as **one document** including all annexes and appendixes and does not exceed a total of 30 pages.

5.7 Late Proposals

Late proposals **will not** be accepted and will be returned to the consultant.

5.8 Changes to Proposal Wording

The consultant will not change the wording of its proposal after closing and no words or comments will be added to the general conditions or detailed specifications unless requested by NSBI for purposes of clarification.

The consultant may change a previously submitted proposal by withdrawal, amendment or submission of a replacement if done prior to the tender closing date and time. This information or request should be submitted in writing on company letterhead or equivalent and contain the signature of the individual submitting the original submission.

Consultants must indicate on the outside of the envelope that the proposal contained within replaces and take the place of a previously submitted proposal or part thereof.

6.0 GENERAL INSTRUCTIONS

6.1 Eligibility

Prospective consultants are not eligible to submit a proposal if current or past corporate and/or other interests may in the opinion of NSBI, give rise to a conflict of interest in connection with the project. Consultants are to submit with their proposal documents any issue that may constitute a conflict of interest violation for review by NSBI. NSBI's decision on this matter will be final.

6.2 Consultant's Expenses

Consultants are solely responsible for their own expenses in preparing, delivering or presenting a proposal and for subsequent negotiations with NSBI, if any.

6.3 Grounds for Disqualification

The consultant shall direct all questions regarding this Request for Proposals to the individuals identified in the Enquiry Contacts/Project Management section of this document. Any attempt on the part of the consultant or any of its employees, agents, contractors or representatives to contact any of the following persons with respect to this Request for Proposals may lead to disqualification:

- a) any NSBI board member;
- b) any member of NSBI staff other than those specified;
- c) any employee of the Nova Scotia provincial government.
- d) any current employee of the Government of Canada as well as any former employee in violation of the Government of Canada post-employment conflict of interest policy

6.4 Firm Pricing

Prices/per diem must be firm over the entire period of this Request for Proposals.

6.5 Currency and Taxes

Prices are to be quoted:

- In Canadian dollars;
- Inclusive of all applicable taxes.

6.6 Subcontracting

If used, the consultant must attach a list of subcontractors (name, address, services provided) who are proposed for work on this project.

6.7 Interviews

Subsequent with the submission of proposals, interviews may be conducted with some of the consultants for the purposes of qualification.

6.8 Obligation

NSBI will not be obligated in any manner to any consultant whatsoever until a written agreement is mutually reached with the successful consultant regarding the execution of the project.

6.9 Definition of Contract

"A written agreement between NSBI and the successful consultant to undertake the project according to defined terms, conditions, deliverables, and price."

6.10 Liability for Errors

While NSBI has used considerable efforts to ensure an accurate representation of information in this Request for Proposals, the information contained is supplied solely as a guideline. The information is not guaranteed or warranted to be accurate by NSBI, nor is it necessarily comprehensive or exhaustive. Nothing in this Request for Proposals is intended to relieve consultants from forming their own opinions and conclusions with respect to the matters addressed in this Request for Proposals.

6.11 Acceptance of Terms

All the terms and conditions of this Request for Proposals are assumed to be accepted by the consultant and incorporated in their proposal. Consultants who have obtained the Request for Proposals electronically must not alter any portion of the document.

6.12 Special Conditions

The agreement can be terminated at any time for service levels which are not acceptable to NSBI. The agreement can be terminated by either party, with or without cause and at its sole discretion, by giving 10 days prior written notice to the other party, without further obligation or penalty.

6.13 Financial Stability

Successful consultants may be required to demonstrate financial stability and may be required to register to conduct business in Nova Scotia.

6.14 Ownership of Proposals and Freedom of Information

All documents, including proposals, submitted by NSBI become the property of NSBI and are subject to disclosure under the Nova Scotia *Freedom of Information and Protection of Privacy Act*. Further information about this Act may be found on <http://foipop.ns.ca/legislation>. By submitting a proposal, the consultant thereby agrees to public disclosure of its contents. Any information the consultant considers 'personal information' because of its proprietary nature should be marked as "confidential", and will be subject to appropriate consideration as defined within the *Nova Scotia Freedom of Information and Protection of Privacy Act*.

6.15 Use of Request for Proposals

This document, or any portion thereof, may not be used for any purpose other than the submission of proposals.

6.16 Confidentiality of Information

NSBI is required to comply with the *Personal Information International Disclosure Protection Act* (S.N.S 2006, c.3). This Act creates obligations for NSBI and its service providers when personal information is collected, used or disclosed. Requirements include limiting storage, access, and disclosure of personal information to within Canada, except as permitted by the Act. Further information about this Act may be found on:

<http://nslegislature.ca/legc/statutes/persinfo.htm>

Information pertaining to this competition obtained by the consultant as a result of participation in this project is confidential and must not be disclosed without written authorization from NSBI.

The proposal must clearly identify the expected travel costs as well as clearly identify the lead consultant who will be travelling on the mission.

6.17 Reciprocity

NSBI may consider and evaluate any proposals from other jurisdictions on the same basis that the government purchasing authorities in those jurisdictions would treat a similar proposal from a Nova Scotia consultant.

7.0 CONTRACT CLAUSES

7.1 Registration of Workers' Compensation Board

The contract may contain a provision that the consultant and any approved subcontractors must be registered with the Workers' Compensation Board (WCB), in which case WCB coverage must be maintained for the duration of the contract. Prior to receiving any payment, the consultant may be required to submit a WCB Clearance Letter indicating that all WCB assessments have been paid.

7.2 Indemnity

The consultant shall indemnify and save harmless NSBI, its employees and agents from and against all claims, demands, losses, damages, liens, awards, charges, actions, costs and expenses made against or incurred, suffered or sustained by the corporation at any time or times (either before or after the expiration or sooner termination of a contract for a specific and defined project) where the same or any of them are based upon or arise out of or from anything done or omitted to be done by the consultant or by any servant employee, officer, director or subcontractor of the consultant pursuant to the contract.

7.3 Insurance

The contract may contain a provision that the consultant shall without limiting its obligation or liabilities and at its own expense, provide and maintain throughout the contract term, Comprehensive General Liability in an amount not less than \$1,000,000 inclusive per occurrence insuring against bodily injury, personal injury and property damage and including liability assumed under contract with insurers licenses in the province of Nova Scotia and in the forms and amounts acceptable to NSBI. All required insurance will be endorsed to provide NSBI with 30-days advance written notice of cancellation or material change. The consultant will, on demand, provide NSBI with evidence of the required insurance.

7.4 Contract Administrator

The successful consultant will be expected to name a project lead to be responsible for the engagement.

7.5 Compliance with Laws

The consultant shall give all the notices and obtain all the licenses and permits required to perform the work. The consultant will comply with all laws applicable to the work or performance of the contract.

8.0 EVALUATION PROCESS

8.1 Selection Criteria

The successful consultant will be selected based upon the following:

- The extent of knowledge and experience in relation to the project scope.
- Demonstrated network of contacts from various sectors and including both products and services within the Hamburg, Germany and surrounding area.
- Proven ability to successfully coordinate ocean technology trade missions.
- The consultant must clearly articulate that they have adequate time and resources to devote to the mission.
- Understanding of the scope and objectives of the proposal.
- Organization of proposal including proposed approach, work plan and schedule.
- Cost* (in Canadian dollars)

Prices should be provided on a **per company** basis.

The total budget allocation for the matchmaking and organization component of this project will not exceed \$60,000 Canadian for a total of ten (10) companies, including any and all taxes. This project will also include a maximum budget of \$10,000 Canadian for in market delegate transportation to and from meeting locations and group events. Please note that this amount also includes any travel or accommodation by consultant, if applicable as well as Company transportation to and from business meetings and group travel if appropriate.

*Determination of best value may not result in the lowest costs being acceptable.

The selection committee and project steering committee will consist of representatives from ACOA and NSBI.

8.2 Criteria Scoring

PART A (Mandatory)

Did the Proposal follow the format suggested in RFP	YES	NO
Curriculum Vitae of consultant and subcontractor/s, if applicable, engaged to work on the project (project lead should be clearly identified)		
Client references provided		
Identification of methodology and resources required to carry out the project		
Success indicators and metrics for evaluation		
Cost per company		
Budget within costing structure provided		
Proposed timeline		

PART B (Scoring)

Criteria	Value	Score
Significant knowledge of opportunities in the market. Note 1: Significant knowledge is defined by breadth and depth of knowledge spanning at least 10 years. Note 2: Must score at least 15/20	20	
Demonstrated network of contacts in market	20	
Demonstrated ability to successfully coordinate trade missions	20	
Quality of Proposal		
Demonstrated understanding of the project, its objectives and metrics for evaluation	15	
Completeness and suitability of approach	5	
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	

9.0 BUDGET

Please include in the quotation any administrative expenses – printing, faxes, mailings, telephone, etc., as well as travel costs to be incurred by the consultant. Please note, ground transportation costs, meeting room costs in-market will be covered by the consultant and receipts submitted at cost to the organizing team of ACOA and NSBI for payment; trade mission participants are responsible for paying their own accommodation and travel costs.

For budgeting purposes, the consultant must develop and present its fee schedule on a per-company basis. Final contract price will be determined by the number of companies participating. It is expected that between seven (7) and ten (10) companies will be recruited for the mission.

The proposal must clearly identify the expected travel costs as well as clearly identify the lead consultant who will be travelling on the mission.

10.0 PAYMENT SCHEDULE

NSBI shall pay 25% of the amount owed to the consultant upon execution of the Agreement, 65% upon submission by the consultant to NSBI of the final matchmaking schedule and 10% upon satisfactory completion of the Services. To achieve satisfactory completion of the Services, the consultant must provide a final report to NSBI which is in form and content satisfactory to NSBI and includes complete final meeting schedules for each participating company, any immediate company results, follow-up suggestions for each participating company, and observations on what worked and what could be improved upon for future missions. On receipt of the final report from the consultant, NSBI will evaluate the final report and the Services and will determine, in its discretion, whether to release the final 10% payment to the consultant. NSBI's evaluation will include consideration of:

- (a) scores achieved by the consultant in exit surveys completed by participating companies;
- (b) feedback from participating companies and partners; and
- (c) the number of meetings arranged by the consultant per participating company.

NSBI shall also pay the consultant for travel expenses in respect of the performance of the Services (by reimbursement) as outlined in the Request for Proposals and if the consultant provides NSBI, within five (5) working days of the completion of the Services, with copies of paid invoices for the travel expenses claimed.