

Atlantic Canada Lead Generation Research

Request for Proposals

November 2023

Ref 28-11-23



**REQUEST FOR PROPOSAL-
Notice to Prospective Consultants**

November 28th, 2023

You are invited to review and respond to this Request for Proposal (RFP), providing consulting services related to hosting an ***Atlantic Canada Lead Generation Research***. In submitting your proposal, you must comply with these instructions.

Please note that no verbal information given will be binding unless such information is issued in writing as an official addendum.

In the opinion of the Atlantic Association of Community Business Development Corporations, this RFP is complete and without the need for explanation. However, if you have questions, or should you need any clarifying information, the contact person for this RFP is:

Joe Brennan
(Atlantic Association of Community Business Development Corporations)
902-747-2232 (Office)
902-631-2397 (Cell)
joe.brennan@cbdc.ca

Please note we require all responses to this RFP to be based on fixed-priced quotes, no estimated quotes will be considered.



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1.0 Introduction

The Atlantic Association of Community Business Development Corporations (AACBDC) invites interested firm(s)/consultant(s) to respond to this Request for Proposal (RFP) to provide consulting services related to research and identifying markets in specific regions, including the USA, North Europe, Southern Europe, and other regions as highlighted by the consultant's insights where we can host multiple in-market lead generation events throughout the 2024-2025 fiscal year.

2.0 Contracting Agency

For this contract, the AACBDC will be the contracting agency.

The AACBDC is engaged in community-based business development through a network of autonomous, not-for-profit organizations that work with all levels of government and the private sector to meet the needs of small and medium enterprises.

In Atlantic Canada, there are 41 corporations dedicated to assisting small and medium enterprises including start-up, expansion, modernization, and maintenance of business entities in all sectors of the economy.

The AACBDC administers, on behalf of its 41 member CBDCs, several programs and initiatives. AACBDC is governed by a volunteer Board of Directors that is selected by each of the Atlantic provinces to provide oversight and governance of the affairs of the organization.

3.0 Background

3.1 Atlantic Growth Strategy

The Government of Canada and the Provinces of New Brunswick, Newfoundland and Labrador, Nova Scotia, and Prince Edward Island (Atlantic Provinces) recognize that trade and investment are key economic drivers in the Atlantic region.

Through an all-inclusive, pan-Atlantic, whole-of-government approach - the Atlantic Growth Strategy (AGS) (<http://www.acoa-apeca.gc.ca/ags-sca/Eng/atlantic-growth.html>) undertakes cooperative actions aimed at stimulating economic growth in the region.

3.2 Atlantic Trade and Investment Growth Strategy (ATIGS)

One pillar of the AGS is the Atlantic Trade and Investment Growth Strategy (ATIGS) which was first launched in 2017 and renewed in 2022. The new strategy builds on successes and lessons learned and aims to strengthen the implementation of firm-focused, growth-oriented trade and investment activities in a coordinated manner.

Under the new ATIGS, the core federal and provincial partners will work with partners to achieve the following three main objectives:

- Increase the number of Atlantic firms engaging in international business activity.

- Increase the capacity of Atlantic firms to strategically enter new, sustain, or increase their activity, in international markets.
- Strengthen the region's capacity to attract FDI.

In support of the updated ATIGS, the federal and provincial partners have renewed their commitment to trade and investment in Atlantic Canada by signing a joint Atlantic Trade and Investment Growth Agreement (ATIGA). Under the ATIGA the partners will invest close to \$20 million over five years to implement firm-focused, strategic market development plans to expand Atlantic Canada's international business activities.

The ATIGS Management Committee (MC) has created an FDI Team that has been given the mandate to collaborate on projects that will focus on increasing FDI in Atlantic Canada. FDI is defined as investment transactions with individuals/entities outside of Canada.

The FDI Team aims to strategically market the region by displaying the best it has to offer to:

- Attract new global investments.
- Ensure regional investment stakeholders have the information and training required to respond to incoming foreign interests.
- Encourage the coordination and leveraging of federal and provincial resources to close more foreign investment deals in Atlantic Canada.

3.3 Project Background

The four Atlantic Canadian provinces and ACOA, through ATIGS, hosted a successful in-market investment attraction event in the fall of 2023 on the West Coast of the United States. The event saw a delegation representing the four Atlantic Provinces and the Trade Commissioner Service host events in Portland, Oregon, Seattle, Washington, and Irvine, California. During this in-market event, we hosted 85 companies in total over the three-day event.

The consultant retained to work on this project was responsible for identifying C-suite level executives from companies within the three regions with revenues that ranged from \$30 - \$100 million with plans to expand within 18 months - 5 years. (Tier 1: prospects within 18 months; Tier 2: prospects within 18 months to 3 years; Tier 3: prospects within 3 to 5 years). Also, they were responsible for organizing 20–30-minute B2B meetings during the events, which allowed the companies to highlight expansion plans and provide an opportunity for provinces to pitch their value proposition.

Building on the success of this event, the FDI team would like to retain a consultant to identify additional markets considering the parameters noted above, where we can host similar events through the 2024-2025 fiscal year.

The consultant's focus will research and explore markets in specific regions, including the USA, North Europe, Southern Europe, and other regions as highlighted by the consultant's insights.

The primary focus of the research will be to identify key markets that have companies that are expanding in our four mutual sectors – oceans, aerospace and defense, energy (renewable and storage), and cyber-security.

The consultant should understand the region from an investment attraction perspective as well as international market knowledge.

3.4 Engagement Overview

This initiative is designed to identify and advance foreign direct investment leads within the oceans, aerospace and defense, energy (renewable and storage), and cyber-security sectors for the Atlantic region.

Atlantic Canada is often overlooked by international investors for a variety of reasons including lack of awareness of its value proposition, aggressive competition, fewer FDI resources relative to larger competing jurisdictions, and the incorrect assumption that the region does not have a well-diversified economy suitable for success. This research will help identify locations globally where trends indicate companies are exiting and/or companies in the specified sectors that are ripe for expansion.

3.5 Engagement Oversight

The AACBDC has appointed Joe Brennan as Program Manager to liaise with the consultant for ongoing information and project management requirements. For the length of this engagement, the consultant will report to the Program Manager.

Additional oversight may be provided by the project team, which is comprised of:

- Two representatives from the Atlantic Canada Opportunities Agency (ACOA).
- One representative from each of the four Atlantic provinces (Provincial EDOs).
- One representative from the AACBDC.

4.0 Description of Initiative

4.1 Research

Our organization is embarking on a strategic initiative to broaden our market reach and facilitate business connections in key sectors across the globe. To spearhead this expansion, we are engaging the expertise of a consultant with their primary objective to identify and pinpoint potential markets where we can host a series of in-market events throughout the 2024-2025 fiscal year.

The consultant's focus will research and explore markets in specific regions, including the following:

- **USA:** Denver, San Francisco, Phoenix, Austin, Boston,
- **North Europe:** Netherlands, Germany, UK, France

- **Southern Europe:** Spain, Italy
- And other regions as highlighted by the consultant's insights and research.

The consultant will research and identify markets in the regions noted above with companies actively expanding within the four mutually significant sectors that include oceans, aerospace and defense, energy (renewable and storage), and cyber-security sectors for the Atlantic region.

Moreover, the consultant will not only identify potential markets but will also recommend several venues within each location that are perfectly suited to host high-impact, business-to-business (B2B) meetings. The selection of venues will ensure the environment necessary for fostering productive networking and collaboration opportunities.

Following the comprehensive research and venue recommendations, the Atlantic FDI team will review the findings. Based on the consultant's research and recommendations, the FDI team will strategically choose markets to target in the upcoming fiscal year for hosting in-market events. These events will serve as pivotal platforms to foster meaningful connections, facilitate business partnerships, and drive growth opportunities within our target sectors.

Through this initiative, we aim to not only expand the knowledge of the Atlantic region in key global markets but also promote growth and innovation across oceans, aerospace and defense, renewable energy, storage, and cybersecurity sectors in emerging markets worldwide.

5.0 Deliverables and Milestones

Below is a full breakdown of activities the project team will conduct in the lead-up to the mission.

Project Milestone	Timeline	Outcome
Engagement of Consultant	January 2023	The consultant has been identified, and project onboarding has commenced.
Market Research	January 2023	Consultant to begin research to identify markets globally so that the FDI team can plan on hosting in-market events throughout 2024-2025.
Final Project Report	January - February 2024	The consultant will provide a report on the market research, identifying markets globally that the Atlantic FDI team can host multiple events in the next fiscal year.

6.0 Proposal Structure

Table 1: Response Structure	
Introduction	This section should briefly describe the firm, its capabilities, and its experience in handling an assignment of this nature.
Understanding the issue	This section should explain the consultant's understanding and interpretation of the objectives and requirements of this project. The successful consultant(s) will have demonstrated a good understanding of the work to be undertaken.
Work plan and methodology	This section should include the consultant's work plan, methodology, and understanding of the objectives and tasks outlined in section 4.0 above. <ul style="list-style-type: none"> • Highlight the firm's connections within the target geographical markets.
Summary of qualifications and experience	This section must include: <ul style="list-style-type: none"> • A brief résumé of the qualifications and experience of the consulting firm as they relate to this RFP. It should clearly outline corporate knowledge of the sector and regional knowledge. • A list of key project personnel to be used in the project outlining their roles and responsibilities. • (If applicable) a list of any subcontractors (individual or organization) that the consultant intends to use when providing services under this RFP. • Corporate profiles and short-form résumés of key project personnel, as well as references for related work to be included as an appendix. Provide two reference projects where the company has undertaken work of similar scope and scale.
Pricing	Pricing is to be detailed in a table and should include: <ul style="list-style-type: none"> • All professional fees • Travel costs (if applicable) for face-to-face meetings • Other costs

7.0 Project Schedule

The project schedule should assume an approximate starting date of January 9th, 2023. The term of the contract is anticipated to be up to and including March 1st, 2024.

8.0 Submission of Proposal and Vendor Information

Proposals must be received by the AACBDC contact no later than 4:00 p.m. on December 15th, 2023.

- Proposals should not exceed twenty (20) pages, excluding appendices. Appendices are acceptable as outlined previously.
- A digital copy is required.
- The successful proponent will be contacted within 14 business days of the RFP closing.
- Please submit an electronic version of the proposal in Word and Adobe Portable Document Format (PDF) to the following email address: joe.brennan@cbdc.ca.

9.0 Proposal Evaluation

The AACBDCs will evaluate the proposals. The lowest-priced proposal may not necessarily be accepted. The AACBDC reserves the right to recommend rejection of all proposals and either cancel or re-issue the RFP if necessary.

The qualifications, commitment, related experience, and knowledge of the project personnel will be key evaluation factors. The experience of the consulting team in undertaking assignments of this nature and magnitude will be a significant factor in proposal selection. The evaluation framework outlined in Table 2 will be used in the selection with special attention given to the methodology, the project management, and the delivery plan.

The criteria used to evaluate proposals fall into the following categories as referenced in Section 6:

	Factor	Scoring
1.	Consultant (s) experience demonstrates the ability to provide requested services	15
2.	Consultant (s) demonstrates an understanding of the project and its objectives	25
3.	Completeness and suitability of approach (proposed methodology)	20
4.	Capacity (relevant skills and experience by the individual)	15
5.	Pricing	25
	Total	100

Please note: we may choose to interview a shortlist of consultants as part of the evaluation process.

10.0 Awarding of Contract

The resulting contract will contain such reasonable terms as the AACBDC may require.

The award of the contract will be made by the AACBDC, based upon the results of the evaluation of submitted proposals. The AACBDC will notify the successful Consultant in writing via electronic means. Those that are not successful will receive a written notification via electronic correspondence as soon as possible once the award of the contract has been accepted and the negotiations have been concluded with the successful Consultant.

11.0 Contact

All inquiries and requests for clarification must be submitted via email. Requests for clarification should be directed to joe.brennan@cbdc.ca.

The AACBDC will administer the contract for this project. Contact for this RFP is:

Name: Joe Brennan

Organization: Atlantic Association of CBDCs (AACBDC)

Address: 459 Murray Street, Mulgrave, NS B0E 2G0

Email: joe.brennan@cbdc.ca

Telephone: (902) 747-2232 Ext 202 or (902) 631-2397 Cell

12.0 General Conditions

Verbal information or representations shall not be binding on the AACBDC. Only changes, alterations, modifications, or clarifications approved in writing will be binding. To be valid all such changes, alterations, modifications, or clarifications shall be issued in the form of addenda and all such addenda shall become a part of this RFP.

The proposal of the successful Consultant will form part of any resultant contract agreement by attachment and incorporation by reference. Claims made in the proposal will constitute contractual commitments. Any provision in the proposal may be included in the resultant contract as a direct provision thereof. The successful Consultant, as a condition of submitting its proposal, accepts a customized contract that will be negotiated.

Any resultant contract from this RFP will be governed by the by-laws of the AACBDC and shall be issued in the name of the successful Consultant exactly as that successful Consultant's personal or corporate name is stated in the RFP response document. Funds payable for materials delivered under any resultant contract shall be paid only to the Consultant who is so listed as a party to any resultant contract. Only legally registered names of proponents are acceptable.

The proposal will contain the signature, name, and title of the person authorized to sign on behalf of the Consultant on the proposal submitted in response to this RFP.

The responsibility rests with the Consultant to submit a complete proposal, with proper and adequate detail to substantiate all aspects of its proposal. Incomplete proposals shall be deemed to be non-compliant. A complete proposal should include but not be limited to:

- Legal name and status: The proposal shall state the correct legal name and legal status of the proposing entity and the correct mailing address.
- Consultant contact: The name, title, telephone and fax numbers, email address and civic address of a representative who may be contacted for clarification or other matters relating to the proposal shall be provided.
- Content: The proposal will be clear, and concise, and must include sufficient detail for effective evaluation and for substantiating the validity of stated claims. The proposal shall not simply rephrase or restate the requirements but rather shall provide a convincing rationale to demonstrate how the Consultant intends to meet these requirements.

The successful Consultant must be licensed to conduct business in its jurisdiction and may be required to produce a certificate of good standing for that jurisdiction.

All terms and conditions will apply to all subcontractors and the Consultant will be responsible for subcontractors' compliance. The Consultant will be responsible for all work done by the subcontractors. The Consultant will be responsible for all damages and will complete any work unfinished by the subcontractors.

The following constitutes the release of payment by the AACBDC for this engagement:

1. 10% released upon signing of the contract.
2. 50% released upon completion of the submission of the draft research to the project proponent.
3. 40% released upon successful completion of the project deliverables and objectives.

13.0 Intellectual Property and Disclosure

All proposals and any intellectual property that is developed as a result of this project, including all data, specifications, concept plans, designs, rationales, presentation materials, economic and technical reports, and related information produced by the Consultant in completing this work submitted shall become the property of the AACBDC. By submitting a proposal, the Consultant hereby grants the AACBDC a license to distribute, copy, print, or translate the proposal for the invitation and completion of the project, including to the members and representatives of ATIGS.

All documents submitted by partner agencies shall remain the property of the issuing organization. All information is proprietary and as such shall be treated as confidential. Information obtained by the Consultant as a result of participation in this project is confidential and must not be disclosed without written authorization.