

**Request for Quotes
USAID CSS RfQ 2018-07**

Subject: Provision of Professional Financial Advisory and Promotional Material Design Services

Contracting Entity: Cardno Emerging Markets USA Ltd., Washington DC, Belgrade Representative Office

Location: Serbia, Belgrade

Issuance Date: August 8, 2018

Cardno Emerging Markets USA, Ltd. (Cardno), the Contractor, acting on behalf of the U.S. Agency for International Development (USAID) as implementer of the Competitive Economy Project, is soliciting bids from qualified, legally registered U.S. or Serbian, non-profit or for-profit companies and organizations, and non-governmental organizations (NGOs) interested in providing the consultancy services as described in Section I. Background and Scope of Work. The successful bidder will be responsible for ensuring achievement of specified tasks/deliverables.

I. BACKGROUND AND SCOPE OF WORK

About the Project

USAID Competitive Economy Project (Project) is the four-year activity with overall goal to establish systemic approaches to strengthening Serbia's food-processing sector in order to generate export-led growth, and greater integration with European and global markets. This will be achieved by systemically strengthening selected value chains (VC) with a focus on aggregate sales, exports and jobs. The Project will identify gaps in the current competitiveness system and strengthen these systems through capacity development and the facilitation of partnerships among system actors.

In order for this to be achieved, the Project will actively seek partnerships with key industry stakeholders to create platforms for exchange and knowledge sharing based on clear, market driven principles, making capacity building an integrated process. While initially focusing on the fruits and vegetables sector, the Project is expected to result in a model that can eventually be applied more broadly across the industry.

Background to SOW

Serbia's food & agribusiness sector is one of the leading sectors of the Serbian economy. The past decade of Serbian food industry was highlighted by foreign investments. The United States' Pepsico, German Nord Zucker, Austrian Rauch, United Kingdom's Salford and Ashmore, Denmark's Carlsberg, and Belgium's AB InBev and Crop's built their factories in Serbia in order to supply the growing markets of EU and CIS countries. From Arabic countries companies such as Al Rawafed and Al Dahra also positioned themselves as investors in Serbia.

As an investment location, Serbia offers low operating costs, free trade possibilities, financial incentives and labor availability, while investment security is fully guaranteed through the Law on Foreign Investments. Through GSP status with the United States; free trade agreements with CEFTA, EFTA, Turkey, Russia, Belarus and Kazakhstan; as well as preferential trade regime with the European Union – Serbia is the only country in Europe which offers custom free export possibilities for all food products to listed markets.

By improving systemic support to food producers and processors, USAID Project aims to boost exports, stimulate innovation and drive investments to better position Serbian brands and products in global markets. The Project recognized foreign direct investments (FDIs) as an important factor for overall sector competitiveness and performance. Concretely, this activity falls under Project's Sub-Purpose 3: Resources for Enterprise Growth Mobilized; Indicator 3.2.: Value if new private capital sector investment in targeted value chains leveraged through USAID.

To assist Serbian agribusiness sector to attract new FDIs, the Project will facilitate participation at high-level international investment conferences, particularly dedicated to agricultural assets available to foreign investments, as the best platform to present advantages of Serbia as a country for agricultural production, food processing, trade and distribution.

Place of Performance:

Serbia

Objective

The objective of this Request for Quotes is to select a Consultant, to procure:

- Financial advisory services to assess selected companies/investment opportunities:
 - o Serbian agribusiness enterprises presently in bankruptcy status as potential investment opportunities to be presented at a high-level international

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- investment conference as brownfield foreign direct investments (FDIs) opportunities;
- Serbian agribusiness companies where senior managers/owners are actively looking to enter into joint ventures with foreign investors;
- Greenfield FDI opportunities suggested by the Project's counterparts
- Promotional material design services to specifically:
 - Identify key financial metrics and marketing opportunities in order to clearly present selected enterprises and investment opportunities to foreign audiences (English language);
 - Design outlook of the brochure(s) and MS PowerPoint/Adobe PDF presentations of the featured companies in a visually attractive manner.
 - Prepare pre-press design of the material and print the brochures.

The Consultant will actively work with Project's Access to Finance and Markets Teams. In coordination with the Project, the Consultant will also closely cooperate and implement all interventions in direct communication with the Project's partners in this initiative.

Equipment:

The Consultant shall provide all necessary equipment, software and licenses for performance of the assignment and for submission of deliverables to Cardno.

Licensing:

The Consultant shall obtain, where appropriate, any necessary permissions from subjects allowing for data to be used for financial analysis, market research and promotional purposes. The Consultant shall provide Cardno and its partners with an unlimited and indefinite license to use the resulting deliverables for all future use cases across all media platforms and events, with or without attribution.

Technical Directions / Relationship with Cardno

For the purposes of this assignment, the Consultant shall take technical direction from Project's Access to Finance Team Leader and designated Cardno Project Manager. The Consultant shall not take direction from any other party without written confirmation from the Cardno Project Manager.

II. Tasks

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The Consultant will conduct following tasks:

1. Discuss with the Project and the partner organizations the following:
 - a. Strategic importance of FDIs for Serbia's agricultural sector;
 - b. Significance and specifics of the selected investment segments (brownfield, greenfield and joint ventures) and selected enterprises/opportunities from each segment
2. Communicate with the Project and partners on data collection methods for gathering all relevant public and privately available information regarding selected enterprises and investment opportunities;
3. Conduct field visits to selected enterprises and gather necessary information from first-hand, through communication with their senior management and/or financial department of selected enterprises;
4. Use all available public and specialized databases available on the market to retrieve and verify all relevant financial, legal and market-related information to compile high-quality presentations of selected enterprises and investment opportunities;
5. Design investment brochure and MS PowerPoint/Adobe PDF documents to present and discuss deliverables with Project and the partner organizations;
6. Upon the agreement with the Project and partner organization regarding the final version of the deliverables (brochure(s) and presentations), the Consultant will organize pre-press design materials to be printed, print the final materials and deliver printed and electronic formats to the Project as the final deliverable.
7. Brochures shall be printed in 100 visually attractive, high-resolution color copies.
8. Electronic brochures/presentations will be recorded and delivered in a custom-designed USB flash memory (50).

III. Period of Performance

Period of performance of the contracted services is August 22nd until September 30th, 2018.

IV. Deliverables

1. Realization work-plan;
2. Detailed timeline covering all meetings, trips and on-site visits;
3. List of relevant sources of information relevant for the activity;
4. Draft versions of requested presentations and brochures for review and approval;
5. Electronic versions of materials (delivered on 50 customized USB flash memories) as well as printed materials (100 copies of the brochure);

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6. Final report of all undertaken activities.

All deliverables including the final report/memo on activities should be prepared in English. Drafts of all deliverables need to be supplied for comments to the designated Cardno Project Manager before delivery. The Consultant will make adjustments to the deliverables in line with Cardno's comments within a week after such comments have been provided. The final report should be provided in five working days after the end of the period of performance.

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V. Requirements for eligible bidders

Legally registered U.S. or Serbian, non-profit or for-profit companies and organizations, and non-governmental organizations (NGOs) with the relevant experience in financial analytics, legal aspects of businesses and market/sales/export related information, with the following Consultant (s) requirements:

- At least 10 years of professional experience in managing financial, legal and marketing research activities related to companies' analytics;
- Experience with agriculture/food processing sector in Serbia
- Experience with donor-funded projects in the field of access to finance for SMEs;
- Experience with public sector
- Possess domestic and international certificates in the field of financial analysis;
- Experience in establishing/managing investment funds will be considered as an additional advantage.

VI. Award

Cardno/the Project anticipates awarding one Purchase order under this Request for Quotes to be allocated until over six-week period. The price of the subcontract to be awarded will be an all-inclusive fixed price. No profit, fees, taxes, or additional costs can be added after award. Under a subcontract all payments will be a fixed-sum, payable upon completion of deliverables. Deliverables and payment amounts, and dates will be defined in detail during negotiations.

Cardno/the Project will select the bid that offers the best value based upon the following evaluation criteria:

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1. Professional Qualifications (30)

The bidder should describe their overall capability to undertake work in this area. A description of proposed Consultancy qualifications and relevant experience to carry out Scope of Work should be included.

2. Past Performance and Experience (50)

Bidder's experience and capabilities in undertaking similar activities should be detailed here, including references, and certifications and awards (if relevant). Bidders should share website links to their online portfolio.

3. Cost proposal (20 points)

Ensure consistency of the costs with the proposed effort for implementing specified tasks in line with technical approach.

The selection of the Offeror for award will be made by the Cardno/the Project Evaluation Committee based on the evaluation criteria above. The award is to be made based on the best overall (i.e., best value) proposal that is determined to be the most beneficial the Project with appropriate consideration given to the three evaluation factors: Qualifications, Experience and Price. The non-price factors, when combined, are significantly more important than the Price factor.

Submission and deadline of bids

The bidders should submit firm fixed price cost proposal broken down per tasks. All cost information must be expressed in US Dollars. Bids including CV and references of proposed staff clearly showing adequate technical background and relevant work experience (portfolio) should be sent by e-mail to: konkursi@konkurentno.rs, **by August 16, 2018, 5 p.m.** CET. Bidders can submit any questions concerning this RfQ in writing via email to konkursi@konkurentno.rs.