Title: Scoping of Ocean Conservation Opportunities for Blue Nature Alliance in the Republic of Brazil  
RFP No: 002-Brazil Scoping  
Date of Issuance: 28 June 2023  

Background  
Blue Nature Alliance is a partnership that brings together NGOs, governments, local communities, and the private sector to provide technical expertise and financial support to catalyze large-scale ocean conservation. Our goal is to support 18 million square kilometers of new, expanded, upgraded or improved ocean conservation areas by 2027. We apply a holistic approach that brings together protection, production, governance, and sustainable finance required to effectively conserve any area for the long-term.  

The Alliance will mostly achieve its target through engagement at a site to help it advance along its conservation journey in a significant way - from creating new areas to expanding, improving management and or upgrading protections of existing areas. The potential sites are evaluated based on the following six criteria:  

- **Significant** – Large areas that combine coastal ecosystems and open ocean that are of vital importance to people and nature;  
- **Catalytic** – Ideas and opportunities that will rapidly build momentum for durable protections, inspire innovative approaches, or push conservation to unprecedented new scales.  
- **Political Will** – Decision-making authorities of national, sub-national, or indigenous communities have expressed a strong vision for ocean conservation; and these leaders are prepared to take action and partner with others, including the Alliance, to achieve this vision;  
- **Local Engagement** – Local champions are ready to work with partners to drive towards impactful ocean conservation outcomes through engagement with their community;  
- **Achievable** – The Alliance aims to engage partners working with clear outcomes and a high likelihood of success;  
- **Leverage** – The presence of co-investment and match funding, which may include government revenues, private sector donations, public funding, or other philanthropic giving;  

A significant focus of the Alliance will be on Large Scale Marine Protected Areas (LSMPAs) as defined by the IUCN to be at least 150,000 square kilometers in size. The Alliance will also make strategic investments in Other Effective Area-based Conservation Measures (OECMs), and other innovative place-based interventions designed to achieve biodiversity conservation outcomes.  

1. **Project Overview**  
Blue Nature Alliance wants to explore opportunities to support sites in the Federative Republic of Brazil that meets the Alliance’s criteria. We seek help on understanding opportunities for improving management of existing LSMPAs around offshore islands in Brazil’s exclusive economic zone, as well as political will for establishing new or expanding LSMPAs, and improving management of Brazil’s entire EEZ. The Brazilian government has reached out to the Blue Nature Alliance,
signaling interest and will to work with the Blue Nature Alliance to advance Brazil’s marine conservation journey.

2. **Terms of Reference, Deliverables and Deliverables Schedule**

Blue Nature Alliance is soliciting the service of qualified individual(s) with deep knowledge of political, socio-economic, and ecological issues pertaining to LSMPAs, OECMs, marine conservation and management in the Federative Republic of Brazil to conduct scoping of opportunities. The successful candidate will:

1. **Provide strategic advice related to opportunities for the Blue Nature Alliance in:**
   (i) Identifying opportunities for expanding Brazil’s network of MPAs, including both expansions of established MPAs, and creation of new MPAs. Sites may include, but are not limited to:
   a. Abrolhos Archipelago MPA  
   b. Amazon Reef/ Foz do Amazonas  
   c. Fernando de Noronha Island  
   d. Albardão  
   (ii) Supporting improved management of offshore LSMPAs in Brazil’s jurisdiction, including the MPA surrounding Saint Peter’s and Saint Paul’s Rocks in the Northeast, and the MPA engulfing the Trinidad and Martim Vaz Archipelago.  
   (iii) Understanding the opportunity to support more comprehensive conservation planning including a marine spatial planning exercise, to minimize conflicts in Brazil’s EEZ and prioritize the development of an ecologically representative network of MPAs and OECMs.  
   (iv) Supporting collaboration within agencies of the Brazilian government and international partners to achieve improved management or MPA establishment/expansion opportunities identified above.  
   (v) Leverage their existing networks and relationships to begin assessment of qualified individuals and organizations who might be well positioned to carry out any proposed work. These assessments should be objective and highlight strengths and areas of expertise needed to advance proposed Alliance goals.

Blue Nature Alliance will prioritise and give special attention to (i) and will invest in the remaining items only if it contributes to strengthening government commitments toward new or expanded protections.

2. **Conduct literature reviews and research related to potential sites of interest.**

3. **Organize virtual meetings with mid and high-level government officials, non-governmental organizations, local community leaders and the broader conservation community in Brazil to:**
   (i) Assess political will and commitment related to ocean conservation.  
   (ii) Identify and assess potential opportunities in line with Blue Nature Alliance’s goal and criteria.  
   (iii) Identify key stakeholders and key contacts at national, provincial, and local levels.  
   (iv) Identify major gaps and obstacles for LSMPAs and OECMs, both nearshore and offshore.

4. **Identify legal pathways that support the establishment and management of protected and conserved areas and the gaps that need addressing. Alternatively, conduct legal analysis of the policy options for designation of new or expansion of protected areas and conserved areas.**
5. Conduct detailed assessment of the potential sites to:
   (i) Provide specifics of at least 5 sites identified by the civil society and/or the government of Brazil for new large-scale MPAs or conserved areas, which may include the size and location, with proposed boundaries if known.
   (ii) Evaluate the potential sites identified above based on the Alliance’s six criteria
   (iii) Using the Blue Nature Alliance Engagement Framework template (for items iii to vii), provide recommendations and justifications of sites with the most potential for the Alliance to support, including proposed workplan and budget, in consultation with the Alliance lead.
   (iv) Identify potential implementing partner/s for the selected sites including their management, relevant work history in Brazil and its relationship with all relevant levels of government, local stakeholders and NGOs based on (v) above.
   (v) Identify opportunities for leveraging funding from government, implementing partners, and other organizations interested in supporting conservation in Brazil, including conducting a high-level philanthropic analysis.
   (vi) Identify potential risks (environmental and social impact) of possible engagement.
   (vii) Perform stakeholder mapping for the selected sites.

6. Supporting collaboration with agencies of the Brazilian government *including conducting review of proposals submitted by said agencies to the Blue Nature Alliance* and international partners to achieve improved management or MPA establishment/expansion opportunities identified above.

7. If decided during the consultation phase, the successful consultant will be required to facilitate a trip and face-to-face meetings between Blue Nature Alliance leaders and relevant stakeholders including high level government officials to discuss identified opportunities for engagement. The consultant will be required to attend these meetings alongside the Alliance team. Please include estimates in your budget for potential travel.

**Methodology:**
- The successful consultant will collect relevant information mostly through virtual and face-to-face meetings and interviews with relevant stakeholders and key informants. This information will be supplemented with literature review and desktop research.
- A preliminary assessment of all potential opportunities will be presented to the Alliance leadership and management team. The Alliance team will then select sites with the most potential for the consultant to conduct detailed assessment of the opportunity.
- The consultant will work closely with the Alliance’s Regional Officer for Latin America and communicate frequently to apprise of the progress and any adaptive management necessary to complete the assignment in a timely fashion.

**Deliverables:**

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<tr>
<th>#</th>
<th>Activity</th>
<th>Deliverable</th>
<th>Acceptance Criteria</th>
<th>Due Date</th>
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<tbody>
<tr>
<td>1</td>
<td>• Desktop research.</td>
<td>An initial report (no longer than 12 pages) outlining potential opportunities,</td>
<td>Review and approval by the Alliance of the initial report</td>
<td>Within 3 weeks from Agreement start date</td>
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<td>Officer for the Americas and Brazil Scoping Team.</td>
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<td>• Organize virtual or in person meetings with mid and high-level government officials, non-governmental organizations, local community leaders and the broader conservation community.</td>
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<td>stakeholder analysis, political commitment, policy analysis and challenges for large scale marine conservation in the Federative Republic of Brazil.</td>
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<tr>
<td>• Desktop research.</td>
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<tr>
<td>• Recurring meetings with the Blue Nature Alliance Regional Officer for the Americas and Brazil Scoping Team.</td>
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<tr>
<td>• Organize virtual or in person meetings with mid and high-level government officials, non-governmental organizations, local community leaders and the broader conservation community.</td>
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<td>• Review Alliance selection criteria and engagement framework development templates.</td>
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<td>A detailed report (no longer than 24 pages) including assessment against Alliance’s site selection criteria for the potential sites identified by the Alliance leadership and management team, with proposed components of a potential workplan and budget estimate, if possible.</td>
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<td>Review and approval by the Alliance of the Detailed report</td>
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<td>Within 6 weeks from Agreement start date</td>
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<tbody>
<tr>
<td>• Desktop research.</td>
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<tr>
<td>• Recurring meetings with the Blue Nature Alliance Regional Officer for the Americas and Brazil Scoping Team.</td>
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<tr>
<td>• Organize virtual or in person meetings with mid and high-level government officials, non-governmental organizations, local community leaders and the broader conservation community.</td>
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<tr>
<td>• Review of existing databases to gather key and accurate data associated with the opportunities identified.</td>
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<td>Produce and share relevant maps, data, and graphs.</td>
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<tr>
<td>Receipt of relevant maps, data and graphs in the format provided by the Alliance</td>
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<td>Within 7 weeks from Agreement start date</td>
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| 4 | • Recurring meetings with the Blue Nature Alliance Regional Officer for the Americas and Brazil Scoping Team.  
   • Design Power Point slides summarizing the findings of the initial and final detailed report.  
   • Attend meetings with the Alliance leadership and management team to present. | Create and deliver slide decks and verbal presentation of initial report and final report to the Alliance leadership and management team. | Delivery of slide deck and presentation of initial report and final report to the Alliance leadership and management team. | Within 9 weeks from Agreement start date |
|---|---|---|---|---|
| 5 | • Recurring meetings with the Blue Nature Alliance Regional Officer for the Americas and Brazil Scoping Team.  
   • Arrange in-person meetings with mid and high-level government officials, non-governmental organizations, local community leaders and the broader conservation community.  
   • Produce an agenda for the scoping trip.  
   Provide support with organizational logistics including hotels, airport, etc. | Facilitate a trip and face-to-face meetings between Blue Nature Alliance leaders and relevant stakeholders. | Successful completion of a scoping trip to Brazil by the Blue Nature Alliance team with a comprehensive agenda that contains strategic meetings with key stakeholders. | Within 12 weeks from Agreement start date and dependent upon decision made during the consultation phase (deliverables 1 through 4) |

3. **Submission Details**
   a. **Deadline.** Proposals must be received no later than **11:59 PM EST on 10 July 2023.** Late submissions will not be accepted. Proposals must be submitted via email to CIProcurement@conservation.org. All proposals are to be submitted following the guidelines listed in this RFP.
   b. **Validity of bid.** 120 days from the submission deadline
   c. **Clarifications.** Questions may be submitted to CIProcurement@conservation.org by the specified date and time in the timeline below. The subject of the email must contain the RFP number and title of the RFP. CI will respond in writing to submitted clarifications by the date specified in the timeline below. Responses to questions that may be of common interest to all bidders will be posted to the CI website and/or communicated via email.
   d. **Amendments.** At any time prior to the deadline for submission of proposals, CI may, for any reason, modify the RFP documents by amendment which will be posted to the CI website and/or communicated via email.
4. Minimum Requirements
   - Master’s degree or equivalent experience in marine conservation, environment, and international affairs
   - Demonstrated knowledge of or experience working with legal aspects of the marine conservation in the Federative Republic of Brazil, including demonstrated ability to analyze legal pathways and identify legal gaps in establishing MPAs and other conservation measures, as well as understanding of relevant stakeholders and the conservation planning process in Brazil.
   - Demonstrated working relationships with relevant government offices or authorities.
   - Fluent in Portuguese and English. All deliverables and reports will be submitted in English while consultation with stakeholders and other key informants will be in Portuguese.
   - Minimum 5+ years of experience working with large scale marine conservation in Brazil

5. Proposal Documents to Include
   a. Signed Representation of Transparency, Integrity, Environmental and Social Responsibility (Attachment 1)
   b. For Individual Consultant:
      o Submit a resume (max 2 pages long) detailing qualifications, certifications, or licenses relevant to this work.
      o Provide a Proposal Summary (max 2 pages long) detailing past experiences for similar projects or assignments that will justify suitability to perform the tasks stipulated for this work (max 2 pages long).
      o Provide at least three references from previous clients.
   c. Cost Proposal. Provide a budget inclusive of daily rates and estimated time needed to complete the work required in the RFP. The cost proposal must be all-inclusive of profit, fees or taxes. Except for unanticipated travel, additional costs cannot be included after award, and revisions to proposed costs may not be made after submission unless expressly requested by CI should the offerors proposal be accepted. All cost information must be expressed in USD.
      If selected, Offeror shall use its best efforts to minimize the financing of any taxes on goods and services, or the importation, manufacture, procurement or supply thereof. If Offeror is eligible to apply for refunds on taxes paid, Offeror shall do so. Any tax savings should be reflected in the total cost.

   Note: Individuals who are interested in implementing part of the potential resulting project by the Blue Nature Alliance are not encouraged to submit an offer.

6. Evaluation Criteria In evaluating proposals, CI will seek the best value for money considering the merits of the technical and costs proposals. Proposals will be evaluated using the following criteria:

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<tr>
<th>Evaluation Criteria</th>
<th>Score (out of 100)</th>
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<tr>
<td>Does the bidder show qualifications highly consistent with those outlined in the professional qualification requirements?</td>
<td>30%</td>
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<td>Does the bidder’s required skills and past performance demonstrate recent proven experience doing similar work?</td>
<td>25%</td>
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7. Proposal Timeline

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<tr>
<th>Event</th>
<th>Date</th>
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<tr>
<td>RFP Issued</td>
<td>June 28, 2023</td>
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<tr>
<td>Clarifications submitted to CI</td>
<td>July 5, 2023</td>
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<td>Clarifications provided to known bidders</td>
<td>July 7, 2023</td>
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<td>Complete proposals due to CI</td>
<td>July 17, 2023</td>
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<td>CI Completes interview with selected bidders</td>
<td>July 30, 2023</td>
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<td>CI completed reference checks for finalist bidders</td>
<td>July 31, 2023</td>
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<tr>
<td>Final selection</td>
<td>August 4, 2023</td>
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8. Resulting Award CI anticipates entering into an agreement with the selected bidder by 7 August 2023. Any resulting agreement will be subject to the terms and conditions of CI’s Services Agreement. A model form of agreement can be provided upon request.

This RFP does not obligate CI to execute a contract, nor does it commit CI to pay any costs incurred in the preparation or submission of the proposals. Furthermore, CI reserves the right to reject any and all offers, if such action is considered to be in the best interest of CI. CI will, in its sole discretion, select the winning proposal and is not obligated to share individual evaluation results.

9. Confidentiality All proprietary information provided by the bidder shall be treated as confidential and will not be shared with potential or actual applicants during the solicitation process. This includes but is not limited to price quotations, cost proposals and technical proposals. CI may, but is not obliged to, post procurement awards on its public website after the solicitation process has concluded, and the contract has been awarded. CI’s evaluation results are confidential and applicant scoring will not be shared among bidders.

10. Code of Ethics All Offerors are expected to exercise the highest standards of conduct in preparing, submitting and if selected, eventually carrying out the specified work in accordance with CI’s Code of Ethics and the Green Climate Fund’s Policy on Prohibited Practices. Conservation International’s reputation derives from our commitment to our values: Integrity, Respect, Courage, Optimism, Passion and Teamwork. CI’s Code of Ethics (the “Code”) provides guidance to CI employees, service providers, experts, interns, and volunteers in living CI’s core values, and outlines minimum standards for ethical conduct which all parties must adhere to. Any violation of the Code of Ethics, as well as concerns regarding the integrity of the procurement process and documents should be reported to CI via its Ethics Hotline at www.ci.ethicspoint.com.

11. Attachments
Attachment 1: Representation of Transparency, Integrity, Environmental and Social Responsibility
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RFP No. **002: Brazil Scoping**

All Offerors are expected to exercise the highest standards of conduct in preparing, submitting and if selected, eventually carrying out the specified work in accordance with CI’s Code of Ethics. CI’s Code of Ethics provides guidance to CI employees, service providers, experts, interns, and volunteers in living CI’s core values, and outlines minimum standards for ethical conduct which all parties must adhere to. Any violations of the Code of Ethics should be reported to CI via its Ethics Hotline at [www.ci.ethicspoint.com](http://www.ci.ethicspoint.com).

CI relies on the personal integrity, good judgment and common sense of all third parties acting on behalf, or providing services to the organization, to deal with issues not expressly addressed by the Code or as noted below.

**I. With respect to CI’s Code of Ethics, we certify:**

- We understand and accept that CI, its contractual partners, grantees and other parties with whom we work are expected to commit to the highest standards of Transparency, Fairness, and Integrity in procurement.

**II. With respect to social and environmental standards, we certify:**

- We are committed to high standards of ethics and integrity and compliance with all applicable laws across our operations, including prohibition of actions that facilitate trafficking in persons, child labor, forced labor, sexual abuse, exploitation or harassment. We respect internationally proclaimed human rights and take no action that contributes to the infringement of human rights. We protect those who are most vulnerable to infringements of their rights and the ecosystems that sustain them.

- We fully respect and enforce the environmental and social standards recognized by the international community, including the fundamental conventions of International Labour Organization (ILO) and international conventions for the protection of the environment, in line with the laws and regulations applicable to the country where the contract is to be performed.

**III. With respect to our eligibility and professional conduct, we certify:**

- We are not and none of our affiliates [members, employees, contractors, subcontractors, and consultants] are in a state of bankruptcy, liquidation, legal settlement, termination of activity, or guilty of grave professional misconduct as determined by a regulatory body responsible for licensing and/or regulating the offeror’s business.

- We have not and will not engage in criminal or fraudulent acts. By a final judgment, we were not convicted in the last five years for offenses such as fraud or corruption, money laundering or professional misconduct.

- We are/were not involved in writing or recommending the terms of reference for this solicitation document.

- We have not engaged in any collusion or price fixing with other offerors.
e. We have not made promises, offers, or grants, directly or indirectly to any CI employees involved in this procurement, or to any government official in relation to the contract to be performed, with the intention of unduly influencing a decision or receiving an improper advantage.

f. We have taken no action nor will we take any action to limit or restrict access of other companies, organizations or individuals to participate in the competitive bidding process launched by CI.

g. We have fulfilled our obligations relating to the payment of social security contributions or taxes in accordance with the legal provisions of the country where the contract is to be performed.

h. We have not provided, and will take all reasonable steps to ensure that we do not and will not knowingly provide, material support or resources to any individual or entity that commits, attempts to commit, advocates, facilitates, or participates in terrorist acts, or has committed, attempted to commit, facilitate, or participated in terrorist acts, and we are compliant with all applicable Counter-Terrorist Financing and Anti-Money Laundering laws (including USA Patriot Act and U.S. Executive Order 13224).

i. We certify that neither we nor our directors, officers, key employees or beneficial owners are included in any list of financial or economic sanctions, debarment or suspension adopted by the United States, United Nations, the European Union, the World Bank, or General Services Administration’s List of Parties Excluded from Federal Procurement or Non-procurement programs in accordance with E.O.s 12549 and 12689, “Debarment and Suspension”.

Name: ________________________________________

Signature: ______________________________________

Title: __________________________________________

Date: __________________________________________