RFP Title: *Clarifying Principles, Definitions, and Standards for Insetting*
RFP No: 01172024
Clarifications
Distributed on: **31 January 2024**

General, Timeline, Budget, & Scope	
1. With which team(s) at CI will this work be primarily conducted? Who is the internal programmatic focal point?	The primary lead and a focal point for CI's insetting work is Elijah Innes-Wimsatt, Corporate Climate Solutions Director in the Center for Natural Climate Solutions (NCS). The insetting team comprises CI staff working across several conservation work streams including carbon crediting, regenerative agriculture, sustainable fashion and NCS for corporations. The consultant will primarily collaborate with this insetting team but also may be required to engage (with the help of the insetting team) members from across CI's science, policy, and country program teams.
2. Is there flexibility in terms of updating timelines to the likely reality of delivering this work?	Some flexibility may be possible if justified to ensure outputs effectively achieve the goals targeted. We believe expediency is required to achieve the outcomes targeted. All work in this scope must be completed by June 30, 2024.
3. I wondered whether you could clarify the commencement date of this project – should we assume 18th March, or would there be any possibility of deferring for a month until late April?	Given that the work needs to be completed by June 30, 2024, a delay in the start date could jeopardize this. The bidder is welcome to state their availability and suggested timeline in the response and CI will consider.
4. Timeline: How flexible is CI if the engagement process takes longer?	CI has some flexibility but would expect respondents to clearly state their availability in their response and any delays would need to be mutually communicated and agreed upon. The work will need to be completed by June 30, 2024.
5. Is there flexibility on reducing the scope and/or expanding the budget?	Some flexibility may be possible if justified to ensure outputs effectively achieve the goals targeted. Additional budget would likely delay the procurement process but we're willing to consider a phased approach if the consultant deems it necessary to effectively meet the goals of the work. This will require discussion and understanding of any individual proposal that requests a change of scope.

6.	Are there other entities/consultants that have expressed interest in the RfP that are interested in tackling certain tasks/components of tasks that are interested in collaborating on covering the overall scope?	We do not disclose the identity of bidders that have been invited to participate or have expressed interest. Joint proposals are welcomed, but bidders are responsible for researching potential partnerships.
7.	[Note: Question modified to for general applicability] Certain organizations were directly referenced in the terms of reference of this RFP and are significant players in the emerging ecosystem around insetting. Would these organizations be disqualified from applying for this RFP given the potential conflict of interest?	Given the nature of this scope and the insetting market, it is likely that multiple potential bidders may have to manage some conflict of interest. We recognize that existing platforms, assurance providers, and developers retain much of the valuable technical expertise in the sector. Accordingly, we would not exclude these bidders assuming they provide a reasonable approach to manage this potential conflict of interest. Bidders should note potential conflicts and how they will address these conflicts to ensure the objectives are effectively achieved. CI will consider whether potential conflicts of interest have been adequately addressed in its review of proposals. Bidders with relevant expertise and experience who opt not to apply given the potential of conflict of interest are still invited to engage CI to ensure they are involved in the stakeholder engagement.
8.	Could you please provide additional information regarding the expected timeline of the public facing deliverables? Participating stakeholders may request additional time for the 2 rounds of feedback to validate and endorse the findings of the stakeholder consultation.	CI has some flexibility but would expect respondents to clearly state their availability/expectations in their response and any changes to schedule would need to be mutually communicated and agreed upon. In Tasks 0 & 1 CI and the consultant will establish a clear stakeholder engagement approach and roles of key involved stakeholders to clarify expectations before starting.
9.	Task 4 In order to get feedback from external entities on the best practices, should that happen in a second round of interviews with stakeholders that is included as an activity within task 4?	The consultant should recommend whatever method they believe is the best for collecting external feedback and endorsement at this stage of work.
10.	Will the contractor be responsible for the design of the public-facing deliverables?	The final deliverable here will be public facing with rounds of revision and feedback completed internally/offline between CI and the selected counterpart. Respondents may include the request for CI to be in charge of the public-facing design in their RFP response to be considered.

11. Should the deliverables under Task 4 (3-5-page document and 3-to-5-page summary) be designed to be public facing? Should the rounds of review for these documents include additional stakeholders in addition to CI?	Yes & Yes. The external stakeholder group(s) to be engaged for additional review of documents should be established during early stage of task 1 and agreed with CI to ensure an orderly and efficient review process.
Task 1. Stakeholder identification and engagement	
12. Task 1 Deliverable 1- Is CI prescribing this approach or does consultant have the flexibility to propose the tactics it recommends to use in engaging stakeholders in its proposal?	CI is open to respondents proposing the tactics they believe would be the most effective mode to engage stakeholders. The consultant should clarify why they believe their proposed approach is preferable in their proposal.
13. While we have direct relationships with many of the proposed stakeholders, will CI help facilitate contact with any CI-requested stakeholders with whom we do not have pre-existing relationships?	CI will be happy to make introductions or facilitate connection with those CI has a working relationship. Where neither CI nor the consultant have an existing relationship, the consultant will be responsible for finding connections with the support of CI, where useful.
14. Stakeholder: Will CI contribute through their own list of contacts?	Yes, but we will likely not have contacts for all stakeholders. The consultant should highlight where they'd be reliant on CI contacts.
15. Will Conservation International provide support during the stakeholder outreach under Task 1?	CI can make the introductions where helpful but the consultant will be primarily responsible for managing engagement.
16. Do consultants need to go via CI relationship managers, or are we able to reach out directly to companies and other stakeholders? Note - if the former, this may impact timeline.	The CI's relationship managers needs to approve the list of stakeholders and in cases where CI already has an existing partnership the relationship manager will need to be kept abreast. The insetting team has and will continue to engage many of the key contacts at existing corporate partners before the kickoff to expedite the process. The consultant will be primarily responsible for managing engagements, keeping the CI team abreast.
17. Stakeholder: Is there flexibility on the side of CI in terms of the number of stakeholders engaged?	Yes. If the consultant believes the objective could be effectively achieved with less or needs additional stakeholders, they should propose so in their approach.
18. The list of stakeholders suggested is exhaustive and spans across different sectors (companies, project developers, Indigenous peoples, etc). Is there an expected representativity of each sector for carrying out the interviews/engagement?	Stakeholder engagement should aim to cover all the groups A-H in Task 1 and strive for balanced representation. The consultant is welcome to recommend a weighting to ensure this representation.

19. What format should the stakeholder feedback be reported in for deliverables in task 2 and 3	We are open to consultant recommendation on format. We prefer a format that allows navigation and presentation of both detailed information like interview notes and useful summary information eg. with graphics/figures.
20. Suggest that interviews also include questions on motivation, efforts made and progress towards insetting, risks and unanswered questions that industry players still maintain. Does CI agree?	Yes and CI is open to respondents suggesting interview questions. We know significant work has already been done by Abatable, IPI, WBCSD, and others to understand barriers to action from both the demand-side and supply-side perspectives. Some sector or industry organizations also likely have a good sense of the progress to date and key challenges of their sectors. We'd like to leverage these already consolidated insights and collaborate with these organizations as much as possible to ensure this work is additional and to avoid duplicative efforts.
21. Are interviews to stakeholders expected across all sectors?	Sectors without FLAG supply chains are not included in this scope. Consultant should suggest approach using Interviews, workshops, and/or surveys to collect perspectives efficiently and effectively. Work done by others (see #20) and sector organizations should be leveraged to effectively consolidate input across groups.
22. Does CI have already in place a specific strategy in mind for each sector/nature of engagement to be involved in the consultation?	The list of targeted stakeholders and engagement methods will be agreed between CI and the consultant in Task 1. We expect the creation of some different stakeholder review groups during this phase to structure engagement. CI is open to consultant's recommendation on the engagement and is seeking consultants with strong engagement experience.
Task 2. Standards Framework Mapping	
23. Task 2: Key Activity 1.C - Given that there are almost 200 NDCs are their specific country NDCs that CI is interested in that the consultant considers as part of this task? Is there a particular reason that CI wants to cover NDCs and NBSAPs given that these are not guidance frameworks or standards that are driving insetting?	The intent is not to consider insetting's implications for each individual countries' NDCs and NBSAPs but rather to explore the degree to which insetting can contribute simultaneously to companies' and countries' climate and nature commitments. If supply chain interventions targeting scope 3 reductions/removals can avoid some of the governmental policy hurdles faced by carbon crediting work, this could increase investment in insetting. There may be differences in policy treatment because the fundamentally different claim and accounting of scope 3 interventions which result in *shared*-claim of *inventory* impact vs credits which result in *single-party*-claim of *intervention* impact. NDCs and NBSAPs are listed as examples of governmental policy

	components/frameworks in the non-exhaustive list in Key Task 1.C. It will be the consultant's task to decide the key climate and nature strategy frameworks to be included in the analysis.
24. Task 2: Deliverable - Can CI clarify what it means by standards orgs ideally validating\endorsing the public facing report? Is giving them the opportunity to review and provide feedback prior to publication sufficient? Setting an expectation of endorsement could be challenging especially if an org takes issue with the gap analysis of their respective standard.	The standards organizations should be involved at the beginning and be able to comment, review and/or contribute prior to publication. Ideally, they would endorse the findings, but we agree this may not be feasible for some organizations given the time and engagement required for a formal endorsement. Therefore, we ask that the consultants make a best faith effort to gain this alignment and address any key critiques provided by the standard-setters.
25. Task 2: Under 2.b is states "This output should leverage the definitions established in Task 1 and agreed in industry. E.g., BVCM vs in value chain mitigation, etc." Under Task 1 there is no reference to a definition. Please clarify.	Apologies for this typo. This should have read: "This output should leverage the definitions established in *Task 4* and agreed in industry." The definition on "in value chain mitigation" can be referenced on page 10 of the following report by WBCSD: https://www.wbcsd.org/contentwbc/download/17897/249081/1
26. Task 2: Deliverable A - would recommend that first an internal-facing report is produced for sign-off by CI. May also be helpful to engage a copy editor, which could be done internally by CI or hired. This team does not have copy editing or design expertise. Does CI agree that we develop an internal facing report for this stage?	The final deliverable here will be public facing with rounds of revision and feedback completed internally between CI and the selected consultant. Respondents without publication design expertise may include this request/caveat in their RFP response to be considered. CI has internal design capacity and can take the final steps for publishing, if needed, but expectations of CI's role should be clear in consultant's proposal.
27. Task 2: Could CI confirm what is meant with "validate key frameworks" under 2.a?	In Activity 1 of Task 2 the consultant identifies which key standards to include in the analysis. In Activity 2 the consultant would then validate this selection through interviews to confirm whether any key standards are missing from the list developed in Activity 1 or were included on the list but should not be analyzed in depth (because they're less important than anticipated).

28.	Task 2: CI makes reference to many climate and nature strategy frameworks, stating the list is non-exhaustive. Given limited time and scope, we may suggest undertaking an assessment of the frameworks prior to interviews and to select a limited number in order to be able to provide rigor and detailed assessments. This could also be viewed in two phases: first phase comparing and focusing on climate related standards/ guidance, second phase expanding scope to nature. These may be distinct consultancies.	CI is open to all suggestions for how to reach our objectives most effectively with the time and budget available. Unless a strong case were made to do so, we would likely prefer the first approach suggested over the second, given the critical and under-valued potential benefits insetting can offer for nature and rapid growth of corporate nature commitments & standards.
29.	In task 2, they mention "Where relevant, pull from learnings from scope 2 market based mechanisms." Can you elaborate on what is meant by this point?	Under the current GHGP rules, market-based mechanisms are only countable for Scope 2. The GHGP is considering how these mechanisms could be used for scope 1 & 3 under a separate process over the next 2 years. AIM, VCI, and others are exploring how these market mechanisms could work. This work should consider how to abate the risks using market-mechanisms for insetting work.
	Task 3. MRV Pathway Assessment	
30.	Task 3: MRV Pathway Assessment; Can you provide more details on the specific insetting project types that you wish to be covered under this proposal? Does the proposal have preferences for certain types of insetting projects over others (e.g., agricultural vs. industrial)?	As noted in section 1. Background: "This project is focused specifically on reductions and removals in Forestry Land-use, and Agriculture (FLAG)-related emissions, although "insetting" is also used by others to refer to other energy- and industry-related GHG reduction approaches." Accordingly, this work is focused on insetting project types on and around farms that are natural climate solutions (NCS), such as forest conservation & management, reforestation & afforestation, improved agricultural practices, grasslands management, biochar application, and wetland restoration & conservation.
31.	Task 3: Can you share a ranking of project types you think this RFP should prioritise and whether some project types would be excluded?	See this article for more detail on NCS: Natural climate solutions	PNAS & downloadSupplement (pnas.org)
		We do not currently have a ranking available, but we'd prioritize project types which are likely to be within agricultural landscapes and that maximize carbon outcomes while delivering significant benefits to both nature and people. We

		are open to the consultants' suggested method for prioritization if needed to reach the objectives of this work within the timeline and budget constraints.
32.	Task 3: Can you provide clarity on the key metric for quantification (i.e., carbon, biodiversity, social benefits)?	Carbon is the starting focus given that the primary financing mechanisms currently in the market are oriented towards carbon outcomes. However, the Task 3 work should include a consideration of the degree to which the verification pathways identified address other key nature and social metrics so that Deliverable A for Task 3 can note gaps and the principles developed in Task 4 can target filling these gaps.
33.	Task 3: Do you have requirements or preferences around understanding the additionality, leakage, permanence, double counting risk, community/stakeholder engagement, benefit sharing, etc. for insetting projects addressed under this RFP?	This work is focused on standards frameworks (Task 2), MRV approaches (Task 3), and principles & definitions (Task 3) -- not individual projects. The factors listed in the question should be considered in this scope as they have clear implications on defining high-quality action. Preference will be determined through discussion with the consultant and feedback from stakeholders. CI is open for suggestions by consultants for how to prioritize to address the goals stated within the budget and timeline. The principles 1-3 below describe CI's approach to high-quality, stakeholder engagement & benefit sharing that can be used as a reference: https://www.conservation.org/about/principles-for-investments-in-natural-climate-solutions
34.	Task 3: What are the geographical boundaries for this proposal? Does the proposal have a preference to focus on more economically developed countries? 35. Do you want to weight the focus of the research and interviews in one hemisphere over the other? If you had to weight the focus between outreach and research between the global north and global south, how would you weight the two?	The focus of this work is not explicitly geographically constrained but if needed to ensure achievement of objectives in the time and budget allocated, the focus would be geographies in the Global South where CI primarily focuses our work. This includes low-income countries and middle-income countries (LICs and MICs) To reference CI's geographies of NCS work please access: https://www.conservation.org/places Note: CI is considering commissioning a second separate piece of work to identify where in the world there is the most potential for insetting towards climate, nature, and social goals (ie. for what commodities/commodity systems and in which geographies is insetting likely to be a major funding driver for action?). Longer term we expect this work to inform our (and other peers) prioritization of efforts but we don't expect this separate work to be completed before the work included in this RFP. We're open to consultant suggestions for

	an approach to prioritization until we have more robust results from this separate work.
36. Task 3: For non-verified approaches: 1. Are there specific criteria or recommendations to determine how this is done? Would requesting interviews on behalf of CI be acceptable? 2. What particular types of second-party verification are considered (e.g., internal audit teams, external consultants, ISO, etc.)?	CI is open to respondent suggestions and can assist with contacts where needed. Requesting interviews on CI's behalf is ok. The goal is to identify through interviews the different types of non-verified approaches companies are taking and assess whether these approaches align with key standards (e.g., GHGP) and the pros & cons of each.
37. Task 3 : For the verification standards being mapped (VCI/Gold Standard, Verra, etc.), can you clarify if you have preferences on the status of the standard (proposal, draft, active, etc.)?	All relevant standards can be included with prioritization to be determined in collaboration with the consultant. For example, Verra's scope 3 standard is nascent but is likely to have large impact due to Verra's size (and thus should be included) while Rabobank Acorn's Plan Vivo-based standard has been in use for multiple years and thus should be included despite its much more limited scope of application than Verra.
38. Task 3: Regarding alignment with the SBTi and GHG Protocol, are there specific criteria or areas from those frameworks that you want specifically addressed?	Specific criteria are to be identified based on initial interviews and discussion with consultants and key stakeholders. Upon initial review, we've identified that the key requirements for accounting for removals according to the draft GHGP Land Sector & Removals guidance and SBTi FLAG guidance are pertinent factors. We're open to consultant recommendation for focus to most effectively meet the objectives given the timeline and budget offered.
39. Task 3: For making recommendations on improving the insetting verification system: 1. Are you most interested in general improvements that all standards could adopt? 2. Are you most interested in improvements to ensure accuracy, scientific rigor, enhance scalability, reduce costs, or increase adoption from companies?	The intent of this task is to ensure verification systems enable insetting investment by improving the integrity of the systems. The gaps identified may be both general and specific to individual verification pathways and should focus on obvious gaps to meeting the key action frameworks like SBTi and SBTN as well as nature and social factors not yet addressed by these frameworks. The consultant should suggest what level of detail is appropriate and possible to meet these objectives within the timeline and budget offered.
Technical scope	

40. Value chain versus beyond value chain Is the scope of work to identify opportunities to increase private sector finance to support farmers in their value chains only to deliver emissions reductions and removals only, or to also increase private sector finance to support stakeholders across landscapes to deliver value chain adjacent emissions reductions and removals?	This work is intended to clarify the approaches and business case for investment both on and around farms. Accordingly, both should be considered in this work.
41. Carbon credits or a wider set of funding activities? The International Platform for Insetting defines insetting as "Interventions by a company in or along their value chain that are designed to generate GHG emissions reductions or carbon removals, and at the same time create positive impacts for communities, landscapes and ecosystems." The definition thus doesn't specifically mention carbon credits, and the RFP does not mention carbon credits or voluntary carbon markets specifically. Is there a preference to keep the focus broad and not focus solely on carbon credits as the insetting funding mechanism?	The preference is to have the consultant solidify a framework/approach to quantifying GHG reductions and/or removals in value chain, enabling the basis for carbon accounting, trading, and claiming in the future. Carbon credits are one approach, but not the only approach, the consultant should consider in this framework. CI prioritizes all quantification metrics, i.e., carbon, biodiversity, social benefits, etc. with an emphasis on carbon.
42. Were there specific points in the report "Tackling Scope 3 emissions in Agriculture & Food value chains" that were missing and need to be specifically addressed in this work?	This work is intended to address some portion of all three of the top-line challenges identified in this report (Standards & frameworks via Task 2, Data & accounting via Task 3, and On-farm incentives as part of principles in Task 4). This work will particularly focus on the interactions between nature-focused and climate-focus standards & frameworks (in line with WBCSD's priority action to improve "coherence between in-value-chain, BVCM and nature-positive approaches"). The consultant is welcome to recommend tweaks to scope to more effectively achieve the outcomes targeted.

	We plan to collaborate with WBCSD throughout this project to ensure alignment and complementarity with their work.
43. We think the learnings from the WBCSD project could be used to gain efficiencies in project delivery, and the priority could possibly shift to defining the strategy specifically for CI. How open are you to proposals that don't respond in detail to all of the needs/tasks listed, and leverage previous projects? How closely will you align with WBCSD on this work?	We intend to remain aligned and collaborate with WBCSD on this work to ensure it meets both CI and broader industry goals and avoid duplicated efforts. If the consultant believes tweaks to the approach and outcomes are necessary to ensure this work achieves the stated objectives, CI is open to alternative proposals. The intent of this work is to be additional, cooperative, and collaborative to drive action given the budget and timeline constraints stated.
44. What is driving the development of this prior to the finalization of the GHG Protocol's Land Sector and Removals Guidance?	The goal of this work is to encourage action while the GHGP LSR is being developed and fill in the gaps expected in the GHGP LSR. For example, the consultant's connection to the GHGP process will be seen as an asset and will improve their ability to manage this moving target. While not directly involved in the GHGP's LSR guidance drafting process currently, CI is striving to include stakeholders in the process who are included in the process.
45. How would updates to the deliverables be completed if they are needed after the LSR guidance comes out?	This work is tackling a quickly evolving space-- MRV approaches, standards frameworks, and regulatory requirements are all changing rapidly. This work is intended to provide a sort of baseline assessment to clarify the landscape and provide a set of principles defining high-quality action that we expect to be remain relevant and inform future standards & MRV development. The work may need to be updated at a later date, but this update is not included within the scope of this RFP. The consultant is welcome to suggest how they believe we can scope this effort to be as useful as possible despite the evolving nature of the LSR guidance.