

# Request for Proposal

*THIS IS A REQUEST FOR PROPOSALS AND NOT A TENDER CALL*

## Foreign Direct Investment (FDI) Strategy

Issued by the  
**Halifax Regional Business and Community Economic Development Association**  
Hereinafter referred to as “Halifax Partnership”

**July 18<sup>h</sup>, 2021**

Proposals will be received by Halifax Partnership until **12:00 PM ADT August 2, 2021** via email for the following Request for Proposal.

RFP Reference Name: **FDI Strategy Green Economy**

Please address RFP questions and points of clarification by **5:00 PM ADT July 23, 2021** via e-mail only to the Vice President of Investment and International Partnerships at the contact information provided below. Responses will be provided by June 26<sup>th</sup> 6:00 pm ADT.

**Nancy Phillips**

Vice President, Investment and International Partnerships

E-mail: [nphillips@halifaxpartnership.com](mailto:nphillips@halifaxpartnership.com)

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## 1.0 SUMMARY OF RFP

[Halifax Partnership](#) is Halifax's economic development organization. Halifax Partnership invites qualified firms to submit a proposal to develop a business attraction strategy that will be complementary to the municipality's ambitious climate plan "HalifACT" and the focus on developing and growing the green economy in Halifax and Nova Scotia.

### INTRODUCTION

The Halifax Partnership drives and accelerates economic growth by selling and marketing Halifax's value proposition (Talent, Location, Cost and Innovation TLC+I) to the world, helping businesses reach their full potential, and tracking Halifax's economic progress. The Partnership's network of influential and globally connected Investors and partners is committed to building a thriving, inclusive, and prosperous Halifax.

Halifax Partnership co-leads Halifax's Economic Growth Plan with Halifax Regional Municipality and is working with private, public, and post-secondary partners to achieve aggressive growth targets of \$30 billion in GDP and a population of 550,000 by 2031.

Attracting and retaining new business is a key strategy within the Growth Plan and will be critical to achieving long-term growth targets. The Partnership collaborates with the private sector, all three orders of government, Nova Scotia Business Inc., and other strategic partners to attract, expand, and retain high-business growth business from around the world.

As part of our culture of collaboration we work closely with partners and as such, we will be undertaking this work with strategic input from staff at the Halifax Regional Municipality and Nova Scotia Business Inc. In future, Nova Scotia Business Inc. may build upon this work to the benefit of regions of Nova Scotia outside of Halifax.

### 1.1 HalifACT and the Green Economy

On January 29, 2019, Halifax Regional Council declared a climate emergency, emphasizing that climate change is a serious and urgent threat. In response, Halifax Regional Municipality developed HalifACT, one of the most ambitious climate action plans and movements in Canada. Endorsed by Halifax Regional Council in 2020, HalifACT is Halifax's long-term strategy to build a more resilient and healthy future while preparing for current and future climate impacts. It is a commitment to reduce emissions, switch to clean and reliable energy sources, and demonstrate leadership in addressing the climate crisis. This transformational plan aligns to the municipality's efforts to support an equitable shift to a green economy by 2050.

HalifACT is as much an economic development plan as a climate action plan. Major public and private sector investments, both domestic and foreign, will be required for building retrofits to be net-zero and climate resilient, the electrification of transportation, and the transition to clean and renewable energy, amongst other actions.

These investments, which are incremental to business-as-usual investments, total \$22 billion over 30 years and will generate significant employment, accelerate innovation, stimulate business growth, and

build and strengthen Nova Scotia's clean technology and renewable energy sectors.<sup>1</sup> Based on the low carbon pathway modeled for Halifax, the first ten years of actions (2020-2030) will result in an annual average 9,000 person-years of employment.

In the first five years of the plan, Halifax will focus on seven priority actions that will enable the city to remain within the low carbon pathway:

1. Retrofit and renewable energy programming
2. Retrofit municipal buildings to be net-zero and climate resilient
3. Electrification of transportation
4. Net-zero standards for new buildings
5. Framework for assessing and protecting critical infrastructure
6. Capacity building for climate adaptation; and,
7. Financing strategy to operationalize the HalifACT plan over 30 years.

**As a phase 1 project, the work for this strategy will be on net-zero new buildings and electrification of transportation.**

## 2.0 SUBMISSION

A complete copy of the proposal must be received by **12:00 PM ADT August 2nd to Nancy Phillips, Vice President of Investment and International Partnerships, via email at [nphillips@halifaxpartnership.com](mailto:nphillips@halifaxpartnership.com)**. The subject line of the email should include the RFP name.

This RFP contains mandatory requirements. Proposals not meeting all mandatory requirements may be rejected without further consideration.

All costs associated with the preparation and submission of the proposal, including any costs incurred by the Proponent after the deadline, will be borne solely by the Proponent.

## 3.0 SCOPE OF WORK AND DELIVERABLES

Halifax Partnership is seeking proposals from qualified and interested firms to develop an FDI Strategy that could be complementary to the implementation of the municipality's HalifACT climate action plan and the growth of Halifax's green economy focused on net-zero new buildings and electrification of transportation.

The final FDI Strategy will be completed no later than December 20<sup>th</sup>, 2021.

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<sup>1</sup> HalifACT (pg. 28) [https://www.halifax.ca/sites/default/files/documents/about-the-city/energy-environment/HRM\\_HalifACT\\_vNew%20Logo\\_.pdf](https://www.halifax.ca/sites/default/files/documents/about-the-city/energy-environment/HRM_HalifACT_vNew%20Logo_.pdf)

The Scope of the work includes:

Exploring the current supply chain landscape, a global and North American level as it relates to the following:

- Developments in the electrification of transportation and net zero buildings and key market trends.
- Identification of key players within the Halifax & Nova Scotia landscape to enhance our understanding of the existing supply chain that can be built on or added to for the build out of electrification of transportation and net zero new buildings.
- Identification of key gaps in the supply chain
- The development of a strategic roadmap to identify specific areas of opportunities.
- Identification of insights that will be used to aid the creation of marketing materials aimed at prospective international foreign direct investment clients. (Marketing material creation is not included in the scope of this work nor is it the responsibility of the chosen consultant).

**Key questions to be answered are:**

1. What are the key components of the electric transportation and net-zero building construction supply chains?
  - a. Consider mapping the targeted verticals to help provide a picture of input/outputs that are involved.
2. Who are the key players within Halifax and Nova Scotia that can enhance our understanding of the existing supply chain?
3. What are the key gaps/opportunities in the Halifax/Nova Scotia supply chain?
  - a. Consider noting the different time horizons (near, medium, far).
4. How do we build and grow the supply chain? Should we develop specific incentives or policies?
5. What is our business case for foreign direct investment in these areas? How should it be used to create marketing materials aimed at prospective international foreign direct investment clients? How and where should this material be distributed? Are there specific conferences, trade shows, etc?
6. What specific companies should we first target and why?
  - a. Provide a clear list of key business targets for FDI attraction purposes.

**Primary research and Stakeholder Engagement:**

It is expected that primary research/stakeholder engagement will be required to deliver the above components. Halifax Partnership, Nova Scotia Business Inc. and Halifax Regional Municipality will make every effort to support introductions for the consultant.

The Scope of Work includes:

- Research and literature review (including HalifACT plan and any other sector strategies/reports).
- Primary and secondary research with key stakeholders in Halifax/Nova Scotia to identify industry and supply chain strengths, opportunities and gaps.
- Development of Halifax's Green FDI strategy and action plan that will include a supply chain mapping and targeted FDI outreach list.
- It is anticipated that other key deliverables may be deemed appropriate to include once initial client/consultant engagement has taken place at the start of the project.

#### 4.0 SUBMISSION CRITERIA AND FORMAT

The following section describes the required content of the response to this RFP. The Proponent is asked to respond in the order outlined in the table of contents below.

##### 4.1 Executive Summary

The Proponent must, in their own words, provide their understanding of the project.

##### 4.2 Company Overview and Organizational Competency

The proponent must provide relevant information regarding company history, core competencies, pertinent experience, and any other relevant information about the company.

##### 4.3 Personnel Assigned

Identify the resources that would be dedicated directly and indirectly to the service and proposed allocation of time. Proposals are to specify the names and qualifications of personnel assigned to this contract, as well as relevant experience. Proposals are to clearly lay out the role each person will assume.

##### 4.4 Approach and Methodology

The Proponent is asked to provide a description of the manner and framework in which the Proponent will work with Halifax Partnership and 3<sup>rd</sup> party partners and stakeholders to achieve the outcomes.

##### 4.5 Conflict of Interest

Proponents shall disclose any potential conflicts of interest and existing business relationships they may have with Halifax Partnership. Failure to disclose or provide false or insufficient disclosure of the nature and extent of any relationship the Proponent may have with any employee of Halifax Partnership, shall be grounds for immediate termination of any contract with Halifax Partnership, in Halifax Partnership's sole discretion, without further liability of notice. By submitting a proposal, the Proponent warrants that neither it nor any of its employees with authority to bind the Proponent has any financial or personal relationship or affiliation with any employee of Halifax Partnership or their immediate families which might in any way be seen by Halifax Partnership to create a conflict.

##### 4.6 References

At a minimum, the Proponent will supply two client references that could be contacted about their working relationship with your company. Halifax Partnership reserves the right to use prior

knowledge and experience as a client reference in the evaluation of a proponent’s proposal. It would also be beneficial to have a short overview of any other pieces of work considered to be relevant as background material.

To verify these references, the Proponent must provide a list of contacts and site references. Contacts provided in the proposal should be notified that they may be contacted by the Halifax Partnership as part of the evaluation process.

Reference information should be provided in the following format:

Item	Response
Name, title, phone number and e-mail of the contact(s)	
Name of the organization involved and nature of their business	
A brief description of the engagement, including client objectives, scope and scale, duration, and beginning/end dates	
Names of resources assigned to the engagement	

#### 4.7 Fee Structure

Please use the grid in Appendix A to specify the hourly rates of stated resources. Submit an hourly rate for all categories of personnel that could be required to work on any activities related to the scope of work outlined in this RFP.

The Proponent must add any exclusions or other pertinent information that would impact price (e.g., volume, exclusivity, risk, term/duration, extension options, cost erosion, inflation, bundled or unbundled proposal, time and materials, fixed firm price). All prices must be specified in \$CAN dollars, before taxes.

#### 4.8 Conditions and Assumptions

The Proponent must document any assumptions made in the preparation of their proposed pricing, and any conditions on which successful completion will be based. It is the duty of each Proponent to ask the necessary questions to ensure that they have a complete understanding of the requirement before submitting their proposals. The Proponent is cautioned that Halifax Partnership will not entertain any additional charges or conditions, unless explicitly agreed to by Halifax Partnership in writing, if the preparation assumptions made by the Proponent turn out to be incorrect.

#### 4.9 Safety Protocols

Please identify health and safety protocols, when performing the work under this proposal.

### 5.0 TIMELINES

RFP Release	July 18, 2021
Deadline for Questions (by 5 pm ADT)	July 23, 2021
Proposal Submission Date (by 12 pm ADT)	August 2, 2021

Notification Date	August 16, 2021
Project Kick-off Meeting	August 30, 2021
Research & Literature Review Complete	September 17, 2021
Primary and Secondary Research and Analysis Complete	October 22, 2021
Strategy Development	October 25 – December 1, 2021
Strategy Complete	December 20, 2021

## 6.0 EVALUATION

A collaborative committee comprised of staff from the Halifax Partnership, Nova Scotia Business Inc. and the Halifax Regional Municipality will evaluate proposals according to the required RFP content. This evaluation committee will also provide strategic oversight during the project timeline. The Proponent is responsible for reviewing the criteria and providing appropriate and sufficient information with their proposal.

Proposal Section	Proposal Table of Contents	RFP Section Reference	Evaluation Weighting
1.	Executive Summary	5.1	75
2.	Company Overview and Organizational Competency	5.2	
3.	Personnel Assigned	5.3	
4.	Approach and Methodology	5.4	
5.	Conflict of Interest	5.5	
6.	References	5.6	
7.	Fee Structure	5.7	25
8.	Conditions & Assumptions	5.8	
<b>Overall Maximum Score</b>			<b>100%</b>

## 7.0 AWARDING OF CONTRACT

No contract will be formed, with any proponent, until the contract terms have been successfully negotiated between both parties (Halifax Partnership and the successful proponent). Halifax Partnership is not obligated to any proponent in any manner until an agreement has been signed by an authorized person to sign on behalf of Halifax Partnership. The successful proponent shall supply said contract to Halifax Partnership.

## 8.0 DISCLAIMER

This RFP document does not constitute an offer, nor promise to offer or enter into any business agreement or relationship, nor should any intent to enter into an agreement or relationship be construed.

Halifax Partnership reserves the right to reject any or all proposals or to not accept any proposal which it may consider to not be in its best interest. Halifax Partnership also reserves the right to waive formality, informality, or technicality in any proposal of a non-material nature.

Halifax Partnership reserves the right to cancel this RFP at any time. This RFP implies no obligation on the Halifax Partnership to accept any proposal submitted.

## 9.0 CONFIDENTIALITY

Information about Halifax Partnership obtained by proponents must not be disclosed unless prior written authorization is obtained from Halifax Partnership. The successful proponent agrees that this obligation of confidentiality will survive the termination of the contract between the successful proponent and Halifax Partnership.

## 10.0 ENQUIRIES

All enquiries related to this RFP are to be directed to Nancy Phillips. Information obtained from any other source is not official and may be inaccurate. Enquiries and responses may be recorded and may be provided to all Proponents at the discretion of the Partnership.

### **Nancy Phillips**

Vice President, Investment and International Partnerships

E-mail: [nphillips@halifaxpartnership.com](mailto:nphillips@halifaxpartnership.com)

Phone: 902.476.4498

The Proponent must immediately notify the Vice President, Investment and International Partnerships in writing of any ambiguity, divergence, error, omission, oversight, or contradiction in this RFP discovered by the Proponent and request whatever clarification is required to prepare the Proponent's proposal.

For Halifax Partnership to deal effectively with the Proponent's questions or concerns about any terms, conditions or requirements of this RFP, including the standard terms and conditions, such questions or concerns must be communicated in writing in accordance with the timeline indicated above. Questions received after this time will be answered if, in the opinion of Halifax Partnership, time permits.

## 11.0 CONTRACT PERIOD AND VALUE

Halifax Partnership intends to establish an agreement with one (1) lead Proponent through this RFP process. The Proponent is invited to submit alternative fee proposals and structures to Halifax Partnership which could provide better value for money to Halifax Partnership.

The final budget allocation will be developed between the Halifax Partnership and the vendor to execute the agreed upon strategy. The payment schedule will be negotiated as part of the final contract.

## 12.0 NOTIFICATION

The successful proponent shall be notified by email of the acceptance of their proposal following completion of the proposal evaluation process.

### 13.0 AWARDING OF CONTRACT

The awarding of any contract because of this RFP shall be at the sole discretion of Halifax Partnership. Halifax Partnership reserves the right to either award a contract to the most effective Proponent as determined by the evaluation criteria, or to not award a contract if none of the proposals received represents an acceptable level of value and risk in the opinion of the evaluation.

If Halifax Partnership and a successful proponent are unable to finalize and enter a contract within thirty (30) days of Halifax Partnership notifying the Proponent of success, Halifax Partnership has the right to, at its discretion, enter negotiations with the next best proposal in the opinion of the Evaluation Committee. Halifax Partnership shall have no other responsibility to the original successful Proponent with whom a contract could not be finalized.

### APPENDIX A – PRICING STRUCTURE (MANDATORY)

#### Base Prices/Rates

Consultant must provide an overview of the total cost to deliver the complete scope of work. As well, **please complete the table based on the proposed team and their hourly rates. The levels of personnel below are examples, you may amend as necessary to be relevant to your organization.**

Levels of Personnel (Where applicable)	Hourly Rate
Senior Leadership	
Account Lead	
Account Support	
Creative Lead	
Etc.	