

INDEFINITE QUANTITY CONTRACT (IQC)

Statement of Objectives (SOO) under RFP ATI-062:

Technical Assistance towards Stimulating two-way trade between Kenya and the United States

Introduction

The USAID Africa Trade and Investment (ATI) continent-wide program is USAID's flagship effort in support of the Prosper Africa initiative to expand and accelerate two-way trade and investment between African nations and the United States.

ATI is designed to support the needs and opportunities that USAID Missions and the private sector identify through a small, core set of centrally coordinated technical and institutional support activities, and a large, flexible performance-based subcontracting and grants under contract facility.

Purpose and Background

The purpose of this Subcontract is to provide technical services to the State Department for Trade (SDT), at the Ministry of Investment, Trade and Industry (MITI) and thereby support development and implementation of strategies to advance two-way trade and investment between Kenya, United States of America and the world. This will include technical assistance to further develop priority export value chains for example tea, pharmaceuticals, textiles and apparels, e-commerce and digitally delivered export services; strategic support in project design and upstream work development; product development and market development; strategic communications; Monitoring and Evaluation (M&E); and catalyzing transactions to advance trade and investment.

Scope

The Consultant firm will provide direct support to the Office of the Principal Secretary (PS) for Trade, Kenya in a role that will support the PS to drive growth and competitiveness within priority value chains by conducting thorough analyses, developing strategic plans, optimizing supply chains and identifying and detailing key issues to inform advocating for improved and enabling trade policies. The role aims to enhance the private sector's export readiness, facilitate market access and promote sustainable production / trade practices while ensuring effective communication and collaboration with stakeholders and government agencies. This role will work collaboratively, and in conjunction with USAID/KEA, and ATI.

Objectives and Activities

Based on ATI Activity needs and client demand, future Firm Fixed Price (FFP) task orders may include:

- Conducting value chain analyses of priority commodities utilizing a gender and youth lens, in various value chains such as agriculture e.g. tea, pharmaceuticals, textile and apparel, e-commerce and digitally delivered export services such as raw material sourcing, production processes, distribution channels, and retail sales.

- Conducting in-depth marketing systems analysis, utilizing a gender and youth lens, to identify opportunities and challenges in various target markets across different priority value chains.
- Developing and implementing strategic plans for market entry, product positioning, branding, and marketing tailored to priority value chains and target markets.
- Facilitate optimization of supply chain management across priority value chains to enhance efficiency, reduce lead times, and ensure seamless coordination.
- Provision of expertise in product development strategies utilizing a gender and youth lens, including design innovation, customization, and differentiation to meet the diverse needs of priority value chains and target markets.
- Recommending and facilitating implementing sustainable production practices across priority value chains.
- Providing capacity-building support to enable firms to become export-ready and compliant with international requirements.
- Developing a gender and youth inclusive strategy for and facilitating match making engagements between buyers and sellers within the priority value chains towards targeted dealmaking and demonstrable commitments from the engagements facilitated.
- Developing and implementing e-commerce and digitally delivered export services expansion plans and marketing strategies tailored to priority value chains and target markets to capitalize on online marketing opportunities.
- Facilitate identification of issues to guide policy dialogues and advocacy for and enactment of favorable trade policies, addressing trade barriers, and engaging with relevant government agencies/industry stake holders to facilitate exports and market access across multiple value chains.
- Designing and implementing monitoring and evaluation frameworks with Key Performance Indicators (KPIs) to assess the effectiveness and impact of strategies across priority value chains and target markets.
- Enhance and further develop program management capabilities of the State Department for Trade including advisory on strategic planning of resource management, allocation, in addition to and appropriate program governance towards overall objectives.
- Regular reports: updates to the State Department for Trade. Such assessments may include strategic seminars, targeted events, or other syndication with USG (US Government) stakeholders in collaboration with DAI.
- Effective communication for export market development. Develop and provide strategic communications with clear, targeted messaging and identify relevant communication channels to promote and expand business activities in national, regional and international markets.
- Deal structuring in support of transactions. This includes developing linkages and forging partnerships with financial institutions and the private sector actors. This will entail crowding in Financial Institutions and appropriate investors and donors towards a blended finance offering for the private sector.
- Learning and Knowledge management. capturing, sharing, and applying experiences and lessons gained during the assignment's implementation. Use of case studies, video clips, webinars, podcasts, learning events etc.

Indicative Deliverables

1. **Value Chain analysis:** Comprehensive report on priority value chains including tea, pharmaceuticals, textiles and apparels, e-commerce, and digitally delivered export services. This will include an analysis of raw material sourcing, production processes, distribution channels, and retail sales, and gender and youth engagement within each value chain. It will also identify strengths, weaknesses, opportunities, and threats (SWOT) for each value chain commodity and make recommendations for enhancing efficiency for each value chain commodity.
2. **Market Systems Analysis:** This will include a detailed report outlining opportunities and challenges in various target markets, with gender and age group distinctions, across different priority value chains, a SWOT analysis for each target market and identification of key consumer behaviors and preferences. The analysis will also encompass recommendations for market entry strategies tailored to each target market.
3. **Markets Development Plan:** This will be a tailored strategic plan for market entry, product positioning, branding, and marketing for each priority value chain and target market. It will cover implementation guidelines and timelines for executing strategic plans and the metrics for measuring the success of strategic initiatives.
4. **Supply Chain Management Optimization:** Assessment reports highlighting supply chain inefficiencies and opportunities for improvement and recommendations for enhancing supply chain efficiency, reducing lead times, and improving coordination. This will also include an implementation plan for optimizing supply chain management across various priority value chains.
5. **Product Development Strategy:** A strategy with recommendations for product development strategies, including design innovation, customization, and differentiation. It will also include guidelines for meeting the diverse needs of different priority value chains and target markets.
6. **Sustainable Marketing Practices Guideline:** A guideline covering recommendations for sustainable production and sales practices, business driven solutions, across priority value chains and monitoring their effectiveness.
7. **Capacity Building engagements:** Training materials for workshops to enable firms to become export-ready and compliant with international requirements. Each training session will be documented, and participation recorded via attendance reports, in addition to assessment reports developed on firms' readiness for export.
8. **Matchmaking engagements:** Strategy documents for facilitating buyer-seller engagements within priority value chains. Reports on targeted deal-making and commitments resulting from matchmaking engagements.
9. **E-commerce Expansion Plans:** Comprehensive e-commerce expansion plans and marketing strategies tailored to different priority value chains and target markets. Guidelines for capitalizing on online sales opportunities including quantifiable values of sales/projections attributable to interventions.
10. **Advocacy and Policy Engagement:** Reports outlining issues affecting trade policies and trade barriers. This will include recommendations for advocacy strategies and engagement with relevant government agencies and industry stakeholders.
11. **Monitoring and Evaluation Frameworks:** Design and implementation of monitoring and evaluation frameworks with Key Performance Indicators (KPIs). Regular reports assessing the effectiveness and impact of strategies across different priority value chains and target markets.

12. **Program Management Capability Enhancement:** Advisory report on strategic planning of resource management and allocation. Guidelines for appropriate program governance towards overall objectives.
13. **Regular Reports to the State Department for Trade:** Periodic updates and assessments on export market development activities. Collaboration reports with USG stakeholders in coordination with DAI.
14. **Effective Communication Strategy:** A strategy that entails clear, targeted messaging for promoting and expanding business activities in national, regional, and international markets. Identification of relevant communication channels for dissemination of messaging.
15. **Deal Structuring Support:** Demonstrable Development of linkages and partnerships with financial institutions and private sector actors. Recommendations for crowding in financial institutions and appropriate investors towards blended finance offerings for the private sector.
16. **Learning and Knowledge Development Management:** Documentation of experiences and lessons learned during implementation. Development of case studies, video clips, webinars, podcasts, and learning events for knowledge sharing and application. This will be approved by the ATI Communications Department.

Note: These indicative deliverables will be firmed up and determined at the task order level.

General Implementation Structure

Upon selection and award, ATI will work closely with the awardee(s) to determine the contract structure including final timelines, deliverables, and associated costs. Additionally, ATI and USAID will also work closely with the awardee(s) on the overall learning agenda, including the appropriate cadence for reporting, communications, and other general ongoing project management activities, as well as be a resource to help the awardee achieve overall objectives.

The assignment will take a collaborative multi-stakeholder approach - building on previous work in this area by various relevant Ministries, Departments & Agencies (MDAs), the private sector, and development actors including leveraging the supply-side efforts that the United States Agency for International Development (USAID) is currently supporting under the USAID Africa Trade and Investment (ATI) Activity. Additionally, in-depth consultations with external stakeholders such as importers, buyers, wholesalers, institutional buyers, retailers, and distributors will be integrated.

Monitoring, Evaluation & Learning (ME&L)

The subcontractor will work in alignment with the ATI Monitoring, Evaluation, and Learning Plan (ATI AMELP) developed for USAID/KEA buy-in that includes financial, and economic outcomes, private sector enhancement, deals made, jobs created, among others. ATI will work closely with the subcontractor to define any additional appropriate indicators for the overall interventions based on applicable ME&L (Monitoring, Evaluation & Learning) indicators as identified by ATI and the USAID stakeholders. ATI will work with the subcontractor to develop the Monitoring Evaluation and Learning (MEL) plan for their specific workplan at the kick-off, edit it as needed during implementation (e.g., if additional transactions are added), and will collect and review data from the subcontractor for requisite reporting to USAID throughout the life of the activity. The subcontractor will be required to reasonably maintain and report on relevant data as part of the periodic check-in process. ATI will conduct data quality assessments, as necessary. In many cases, the subcontractor must be willing to share results for at least a six-month period following the completion of their subcontract in order for ATI and USAID to accurately capture results

(e.g., an investment that closes after the period of performance but was facilitated during the contracted support).

Indicator No, Name, and Explanation	Frequency of reporting	Supporting Documents / evidence required	Target	Rationale
<p>Indicator 7: Number of firms that have applied improved organization-level technologies or management practices with USG assistance.</p> <p><u>Indicator Explanation:</u> <i>This indicator measures the number of firms receiving USG assistance that improved their management practices (e.g. financial management, strategic planning, marketing, or sales) or technologies (e.g. acquisition of better equipment or software, or better application of technology) in the past year. In the narrative reporting for this indicator, OUs should briefly explain how they define improved management practices or technologies.</i></p>	Deliverable/ Milestone based	<p>Filled in ATI data entry template on firms applying organization level technologies or management practices.</p> <p>List of firms using the digital platform</p>	TBC	<p>SubK is expected to Develop and implement e-commerce and digitally delivered export services expansion plans and marketing strategies tailored to priority value chains and target markets to capitalize on online marketing opportunities-</p> <p>*Firms using this digital platform can be counted under this indicator.</p>
<p>Indicator 9: Number and value of export deals identified or supported.</p> <p><u>Indicator Explanation:</u> <i>This indicator measures both the total number in USD of export deals ATI has contributed to through technical assistance, provision of financial resources, or other services.</i></p>	Deliverable/ Milestone based	<p>Filled in ATI data entry template on Export deals</p> <p>Signed contract of sales</p>	TBC	From the developed digital platform, the SubK can count number and value of finance/investment deals closed
<p>Indicator 10: Number and value of finance deals identified or supported.</p> <p><u>Indicator Explanation:</u> <i>This indicator measures both the total number in USD of investment deals ATI has</i></p>	Deliverable/ Milestone based	Filled in ATI data entry template on finance/investment deals.	TBC	SubK is expected to support through deal structuring in support of transactions. This includes developing linkages and forging partnerships with financial institutions and the private sector actors.

<i>contributed to through technical assistance, provision of financial resources, or other services.</i>		Term sheets, loan agreement		*linkages are likely to result in closed finance deals
Indicator 11: Number of firms receiving USG funded technical assistance. <i>Indicator Explanation: Defined as ATI supported firms that participate or receive technical assistance. This can include factory assessments, marketing support, business plan development, preparation for buyer missions, trade shows, technical assistance through TPSPs</i>	Deliverable/ Milestone based	Filled in ATI data entry template on firms receiving technical assistance. List of attendance, Capacity building reports	TBC	SubK is expected to engage in Capacity Building engagement as well as market linkages activities. Firms receiving these services can be counted under this indicator
Indicator 17: Number of products produced and disseminated by ATI <i>Indicator Explanation: This indicator counts the number of products e.g., analytical pieces, success stories, lessons learnt, research, Information, Education and Communication (IEC) materials, documents, plans, joint publications and/or agreements, guidelines, strategies, operational policies, or processes produced and disseminated</i>	Deliverable/ Milestone based	Filled in ATI data entry template on products produced and disseminated.	TBC	There are various products the SubK is expected to provide. This includes a detailed report outlining opportunities and challenges in various target markets. Comprehensive report on priority value chains including tea, pharmaceuticals, textiles and apparels, e-commerce, and digitally delivered export services among others
Indicator 18: Number of milestones in improved institutional architecture for trade and investment achieved with USG support. <i>Indicator Explanation: This performance indicator measures the number of milestones in improved institutional architecture for Trade and Investment policy reform. A milestone is a 'positive change' that marks a significant achievement in the</i>	Quarterly Deliverable/ Milestone based	Filled in ATI data entry template on policy milestones.	TBC	SubK is expected to engage in Advocacy and Policy Engagement. This will result in reports outlining issues affecting trade policies and trade barriers. This will include recommendations for advocacy strategies and engagement with relevant government agencies and industry stakeholders

<i>development of better performing, more effective policy systems and describes how the change contributes to improved policies and policy outcomes within a country or regional plan.</i>				
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Place of Performance

This activity will be managed from Nairobi, Kenya. Support will be provided through a combination of remote support with in-person activities possible, where relevant. Offerors should provide detail on their approach to working in countries as the activity requires. The selected firm will report to ATI in coordination with the Principal Secretary for the State Department for Trade.

Implementation Timeframe

The activities outlined above are estimated to take place over twelve (12) months starting on/about June 2024, although offerors should propose a timeline commensurate with their technical approach. In response to this solicitation, offerors may propose their own alternate timelines, work plans, and level of effort associated with the various components of the activity in line with their proposed approach.

Contract Structure

The contract type for the presumptive award is anticipated to be an IQC with Firm Fixed Price (FFP) type Task Orders, issued by DAI Global, LLC. The cost should include the labor categories associated with implementing the SOO requirements in accordance with the offeror’s technical approach, level of effort (LOE) per labor category, and any required non-Labor costs. Offerors should submit cost proposal for the IQC subcontract.

