

## CDP Oceans Strategy Request for Consultancy Proposals

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| 1. Overview        | <p><a href="#">CDP</a> is inviting proposals from consultancy firms to develop its first ever Oceans Strategy and Operational Plan in support of SDG 14. The consultancy is expected to run over a period of 6 months, with the final product being delivered by 09/2022.</p> <p><b>The application deadline for proposals is 1 April 2022.</b></p>  |
| 2. Background      | <p><b>About CDP</b></p> <p>CDP was founded in the UK as the Carbon Disclosure Project in 2000 and pioneered the concept of environmental disclosure as a fiduciary responsibility. In 2003, CDP launched the world's first standardized process to seek disclosure of environmental performance information on behalf of investors, The CDP system today remains the world's only integrated environmental disclosure system, now covering climate change, water and forests.</p> <p>In its first year, CDP secured disclosure from roughly 80 public companies, on behalf of roughly 20 signatory investors. Today more than 13,000 companies disclose through the CDP Platform and various disclosure programs and roughly 600 financial services institutions representing roughly \$110 trillion in assets under management are signatories to CDP's investor requests for disclosure.</p> <p>In addition, CDP secures disclosure from over 1,100 cities, states and regions globally. CDP data and information are drawn upon by countless organizations in both public and private sector and CDP maintains a rubric of licensing or pro bono approaches to data dissemination.</p> <p>CDP is a unique and pivotal entity in the ecosystem of environmental protection, and our disclosure data underpins the work of countless other environmental protection efforts. Growth in CDP disclosure has catalysed significant shifts in capital from high-carbon to low-carbon, and the growth in ESG and sustainable investment.</p> <p>CDP played a major role in securing the Paris agreement and all ensuing policy advances. CDP is funded by philanthropies, commercial partnerships, administrative and other fees, and relevant product and services</p> <p>With funding support from NBIM and others, CDP is now seeking to identify the most efficient, impactful and sustainable strategy to play its unique part in the achievement of SDG 14 - Conserve and sustainably use the oceans, seas and marine resources for sustainable development.</p> |
| 3. Purpose & Scope | <p>The purpose of this assignment is to design a strategy that acknowledges the unique role CDP can play, and identifies the interventions it will need to take, to accelerate ocean action amongst companies, cities and financial institutions.</p>  |
| 4. Objectives      | <p>The objectives of this exercise will be:</p> <ol style="list-style-type: none"> <li>1. The development of CDP's Oceans Strategy, Operational Plan and Budget that identifies the real-world changes we need to drive, the internal actions we need to take to succeed and the short-, medium- and long-term objectives we should meet;</li> <li>2. Mapping the relevant existing frameworks and initiatives in this space;</li> <li>3. Building awareness and buy-in for the Oceans Strategy amongst CDP's key stakeholders;</li> <li>4. Building Oceans-related understanding and capacity of key CDP internal teams to enable them to support the execution of the strategy; and</li> <li>5. Early phase design suggestions of what a corporate and cities oceans-disclosure framework would look like.</li> </ol>  |

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| <p><b>6. Methodology &amp; Work Plan</b></p>           | <p>Applicants should submit an illustrative methodology and work plan to achieve the above objectives, which will be used to assess proposals. The contracted consultant will then develop a detailed methodology and work plan as part of the inception phase of the assignment, in consultation with CDP’s internal Advisory Group for this assignment.</p> <p>The illustrative work plan submitted during the proposal stage, and the eventual work plan detailed during the inception phase should include a schedule and process to interact with CDP and the Advisory Group to ensure their input to and oversight of the exercise.</p> <p>It is expected that time to engage with CDP’s investor signatories, responding companies, responding cities and external oceans-related experts to inform the Strategy will be built into the workplan.</p>  |
| <p><b>7. Deliverables &amp; Tentative Timeline</b></p> | <p>The timeline for this assignment is between April 2022 and August 2022. Key deliverables identified for this assignment are:</p> <ol style="list-style-type: none"> <li>1. Inception report (including final methodology and work plan)</li> <li>2. Final strategy and slide deck including an Oceans-related Theory of Change</li> <li>3. An operational plan and associated budget for rolling out the strategy</li> <li>4. An initial list of ocean-related corporate metrics or indicators CDP can consider for role out</li> <li>5. Workshops/Webinars with key internal and external stakeholders to disseminate learnings and build capacity</li> </ol> <p>Timing for these deliverables will be agreed during contracting.</p>   |
| <p><b>6. Qualifications &amp; Experience</b></p>       | <p>Consultancy firms are invited to submit proposals for this assignment. Competencies and experience include:</p> <ol style="list-style-type: none"> <li>1. Demonstrable expertise in ocean conservation and finance issues, and an understanding of CDP’s unique contribution to the challenge.</li> <li>2. Experience of working to drive environmental change within the private sector – ideally in industrial firms or financial institutions</li> <li>3. Proven track record working to develop organizational strategy and results frameworks with international organizations of similar scale, scope and complexity as CDP.</li> <li>4. Experience managing multiple relationships with stakeholders working on politically sensitive issues.</li> <li>5. Clear and evident familiarity with the governmental and other entities currently involved in oceans related issues, including existing legal treaties and international agreements that apply to oceans and territorial seas management.</li> <li>6. Understanding of state-of-the-art satellite monitoring of the oceans as well as key relevant AI data methodologies.</li> </ol> |
| <p><b>7. Budget</b></p>                                | <p>Proposed budgets will be reviewed with respect to the suitability of the work plan and activities for delivering deliverables in a cost-effective manner. A cap of £80,000 has been earmarked for this exercise. This budget indication is provided only as a guide, not as a requirement. Value for money is a key criterion for the evaluation of Proposals.</p>   |
| <p><b>8. Application Procedures</b></p>                | <p>The full proposal should include two components, and an Annex:</p> <ol style="list-style-type: none"> <li>1) A technical proposal that does not exceed 6 pages, consisting of the proposed methodology and work plan.</li> </ol>   |

- 2) An illustrative budget (per provided template) that itemizes costs in GBP for the proposed work plan and given timeline. The financial proposal should clearly distinguish the budget necessary for different work streams. It should clearly state the cost of key personnel in daily rates.
- 3) Annex:
  - Country of incorporation and (if different) country whose data protection laws apply to the individual or firm.
  - CVs: CVs for each key staff member/consultant who will be working on the evaluation design and implementation 2-page limit per CV.
  - At least one example of a work product most relevant to those identified for this assignment.

Proposals should be professionally presented, submitted electronically via email in Microsoft Office format, in English, with font no smaller than 11 point. Where documents are embedded within other documents, please provide separate electronic copies of these embedded documents.

Applicants should submit only such information as is necessary to respond effectively to this ToR.

For any further queries or clarifications kindly contact Cate Lamb, at [cate.lamb@cdp.net](mailto:cate.lamb@cdp.net).

**9. Proposal Assessment Criteria**

The following criteria will be used to evaluate proposals, with the technical component weighted as 70% and the financial proposal as 30% of the proposal's overall assessment.

**Criteria for Technical Component**

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| Previous experience with similar assignments                           | 30%         |
| Demonstrated technical, managerial and capacity development experience | 30%         |
| Methodology  | 40%         |
| <b>Total</b>   | <b>100%</b> |

**Criteria for Financial Component**

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| The budget is clearly linked to the activities and outputs outlined, with appropriate allocation of time and resources, and costs that appear reasonable for the activities proposed, | 50%         |
| The application provides confidence that the project will represent good value for money, including the Four Es (economy, efficiency, effectiveness and equity)                       | 50%         |
| <b>Total</b>  | <b>100%</b> |

**10. Additional Information**

The strategy work should answer the following questions, as a minimum:

1. Which sectors should CDP target and why? What companies in each sector represent the most impactful?
2. What cities, states or regions?
3. What actions/outcomes should CDP drive with each?
4. What disclosure indicators are best placed to measure these outcomes?
5. Do any of these disclosure indicators already exist? Who owns them?
6. What is the market appetite for providing these indicators (city, regional and corporate disclosers)?

7. What is the market appetite for using these indicators (FI's, Data Service Providers and Buyers)?

The operational plan to be delivered should answer the following questions, as a minimum:

1. What does the introduction of Oceans into CDP look like?
2. What changes to CDP's existing system and ways of working will be needed to support this introduction?
3. What are the cost implications of this for the organisation?
4. What income opportunities exist for CDP from this work that will support its sustainable long-term operation?