

**CRDF GLOBAL
REQUEST FOR PROPOSAL**

Deadline: Ongoing Until Filled

Summary: CRDF Global is seeking subject matter experts to lead a series of roundtables for investors on managing investment risk associated with dual use technology for commercial businesses and start-ups developing advanced technology with military and civilian applications. The purpose of the roundtables is to showcase pathways proliferator states such as China and Russia use to acquire components of weapons systems through leveraging international supply chains and obfuscating transactions through global financial markets to capitalize defense sector entities.

Scope: The expert(s) will lead one virtual two-hour roundtable, and seven three-hour in-person roundtables between June-August 2023 for at least 10 investors per event in Eastern Europe and Turkey on managing investment risk associated with dual use technology. The experts will develop presentations, interactive activities, tip sheets and other training materials on:

- types of commodities and industry sectors subject to additional trade controls which pose increased weapons proliferation risk;
- financial, secondary sanctions and reputational risks associated with investment in these assets/sectors;
- case studies where European technology was incorporated into weapons systems by proliferator states;
- sanctions evasion tactics used by Russian and Chinese defense networks to facilitate corruption in Europe;
- due diligence best practices during the sales, merger and acquisition process to counter illicit acquisition of high-tech ACW components and technology by military end-users;

Experts will contribute to workshop planning and coordination, follow up calls with participants, and after action reporting. Travel costs such as airfare and lodging will be covered by CRDF Global and should be excluded from proposal budgets.

Tasks and Deliverables:

The selected experts will:

1. Lead one two-hour virtual roundtable on managing investment risk associated with dual use technology for a global audience including developing:
 - Agendas and curriculum outlines;
 - Presentations;
 - Tip sheets and other training materials;
 - Interactive exercises, guided discussions and Q&A sessions.
2. Develop, lead and travel to seven, three-hour, in-person, workshops on managing investment risk associated with dual use technology to include:
 - Coordination with other experts and local partners;
 - Agendas and curriculum outlines;
 - Presentations;
 - Tip sheets and other training materials;
 - Interactive exercises, guided discussions and Q&A sessions.
3. The selected experts will engage in virtual check-ins throughout the duration of the contract to discuss project planning, updates, coordination on training materials as needed (up to 20 hours).
4. CRDF Global will be responsible for participant and local partner recruitment, but may request that experts leverage their networks and contacts to assist with recruitment and selection (up to 10 hours).
5. The selected expert(s) will participate in follow-up calls with participants to provide individualized follow-up and guidance, and receive feedback following the workshop. Expert(s) will submit a brief after action report with feedback and recommendations on next steps using a template provided by CRDF Global following the workshops (up to 28 hours).

Contractor Requirements:

A successful proposal will highlight **some** of the following qualifications:

- experience working with and advising investor audiences;
- strong network within the European investment community;
- understanding of the European defense technology ecosystem;
- expertise in military and civilian (dual-use) applications of emerging technologies;
- ability to speak authoritatively on managing investment risk and preventing transfer of technologies to military end users in China and Russia;
- flexibility and ability to respond to adjustments directed by the customer;
- willingness and ability to lead at least one virtual webinar in the local audience’s time zone;
- willingness and ability to travel internationally to lead seven in-person roundtables in Eastern Europe and Turkey between June and August 2023, if local and CDC guidelines permit it. Due to Covid-19, CRDF Global may postpone or rescope the project to entirely virtual engagements which would not require international travel. The selected experts would be informed of any changes in advance.

Successful proposals may come from experts with professional backgrounds in:

- Counter Proliferation Finance;
- Supply chain and risk management;
- Anti-Money Laundering;
- Sanctions Compliance;
- International Law;
- Nonproliferation and arms control;
- Responsible innovation and tech ethics;
- Environmental Social and Governance Investing;
- Socially Responsible Investing;
- Impact Investing;
- Corporate Social Responsibility;
- Business and Human Rights.

Proposal Requirements:

- Statement of Interest and list of recent, relevant experience and past performance related to the requirements above
- Cost proposal with total project cost in USD, hourly rate for each expert, plus detailed breakdown and estimated level of effort hour by task
- CV(s)
- Any Small or Disadvantaged Business Designations (Veteran Owned, HUB Zone, Women Owned, Disadvantaged Businesses)
- NAICS Codes: 541620 Environmental Consulting Services- Small Business Threshold \$15 million
541690 Other Scientific and Technical Consulting Services – \$15 million

Timetable:

February 10: RFP Questions due
February 17: RFP Questions & Answers released
TBD: RFP submissions due
March 13: Contract start date

Contractor Selection Criteria:

CRDF Global will select the contractor that provides the best value in terms of overall price and experience. The contractor should have proven experience working with the subject matter areas and audience described above.

CRDF Global pledges to prioritize sponsorship of diverse events and panels of experts whenever possible. CRDF Global prioritizes a safe and collaborative work environment in which diversity, equity, and inclusion is championed and discussed. CRDF Global provides equal employment opportunities to all qualified individuals without regard to age, race, color, religion, sex, sexual orientation, and gender identity, national origin, protected veteran, or disabled status. We are dedicated to creating and maintaining a respectful work environment that is safe, engaging, and comfortable for all.

Submission:

Proposals should be submitted to procurement@crdfglobal.org and mkosmyna@crdfglobal.org **Ongoing until filled** . Proposals should be submitted as electronic documents in PDF, Word or Excel format.

Background:

CRDF Global is an independent nonprofit organization founded in 1995 in response to the collapse of the Soviet Union and the threat of large-scale proliferation of weapons technology from the region. With support authorized by the Nunn-Lugar Act of 1991 and the Freedom Support Act of 1992, as well private foundation contributions, CRDF Global embarked on bolstering the global scientific community and fostering alternatives to weapons research.

In the past 25 years, our work has expanded to address ever-changing global concerns, but our commitment to ensuring the success of our partners remains the same. We are a leading provider of flexible logistical support, program design and management, and strategic capacity building programs in the areas of higher education, CBRNE security and nonproliferation, border security, cybersecurity, global health, technology entrepreneurship, and international professional exchanges.

With offices in Arlington, VA; Kyiv, Ukraine; Manila, Philippines, and Amman, Jordan, CRDF Global's diverse staff and networks of local community and government stakeholders deliver tailored programs that meet specific regional needs in over 100 countries across the globe.

Vision Statement:

Our world, healthy, safe, and sustainable.

Mission Statement:

Safety, security, and sustainability through science, innovation, and collaboration.

Values:

We do the right thing.

We care about each other and the people we work with.

We work together to deliver excellence

CRDF Global provides equal opportunities to all qualified individuals without regard to age, race, color, religion, sex, sexual orientation, gender identity, national origin, protected veteran, or disabled status. We are committed to prioritizing an inclusive and collaborative space in which diversity and equity is discussed, championed, and supported. We acknowledge and honor the fundamental value and dignity of all individuals.

We pledge ourselves to creating and maintaining an environment that respects diverse traditions, heritages, and experiences.

More information is available at www.crdfglobal.org.

Solicitation Terms & Conditions:

Right to Select Suppliers. CRDF Global reserves the right to negotiate with and select all qualified suppliers at its own discretion and is not obligated to inform suppliers of the methods used in the selection process. CRDF Global reserves the right to dismiss any and/or all suppliers from the bid process and reject any and/or all proposals.

Obligation. This RFP does not bind nor obligate CRDF Global in any way. CRDF Global makes no representation, either expressed or implied, that it will accept or approve in whole or in part any proposal submitted in response to this RFP. CRDF Global may reward, in whole or in part, the proposal at its sole discretion.

Notification. CRDF Global will notify bidders following completion of the evaluation process, as to whether or not bidders have been awarded the contract. The only information regarding the status of the evaluation of proposals that will be provided to any inquiring bidder shall be whether or not the inquiring bidder has been awarded the contract. CRDF Global may, at its sole discretion, inform any inquiring bidder of the reason(s) as to why it was not awarded the contract

Binding Period. Following the due date of submission of this Proposal, the pricing included in this RFP shall be binding upon the supplier for the duration of the contract.

Hold Harmless. By submitting a response to the RFP, bidder agrees that CRDF Global has sole discretion to select any and/or all suppliers. During or following the conclusion of this process, bidders waive their rights to damages whatsoever attributable to the selection process, materials provided, supplier selection, or any communication associated with the RFP process and supplier selection.

Transfer to Final Contract. The terms and conditions of the RFP, including the specifications and the completed proposal, will become at CRDF Global's sole discretion, part of the final contract (the "Agreement") between CRDF Global and the selected bidder. In the event that responses to the terms and conditions will materially impair a bidder's ability to respond to the RFP, bidder should notify CRDF Global in writing of the impairment. If bidder fails to object to any condition(s) incorporated herein, it shall mean that bidder agrees with, and will comply with the conditions set forth herein.

Exceptions. Any exceptions to the terms and conditions or any additions, which bidder may wish to include in the RFP, should be made in writing and included in the form of an addendum to the applicable Section in the RFP.

CRDF Global Proprietary Information. Supplier agrees that all non-public information contained in this document and communicated verbally in reference to this RFP by CRDF Global shall be received for the sole discretion and purpose of enabling the supplier to submit an accurate response to this RFP. The information contained in this RFP and disclosed during the course of negotiations and communications are proprietary in nature and under no circumstances to be disclosed to a third party without prior written consent from CRDF Global.

Supplier Proprietary Information. Information contained in the response to this RFP will be considered proprietary in nature if marked "confidential" or "proprietary". Such marked documents will not be disclosed to third parties outside CRDF Global with the exception of retained consultants under contractual confidentiality agreements.