

MADERA CERO DEFORESTACION

SPECIFICATIONS FOR CONTRACTING TECHNICAL ASSISTANCE AND SUPPORT IN THE DEVELOPMENT OF NEARSHORING TRANSFORMATION MODELS AND BUSINESS FACILITATION

March 2025

1/ Background

The *Zero Deforestation Timber* project is an initiative financed by the European Commission through the AL-INVEST Verde program, whose objective is to promote **sustainable growth and job creation in Latin America**. This program promotes the transition to low-carbon, resource-efficient economies with circular production models, encouraging the adoption of sustainable practices in strategic sectors.

In its 2024 call for proposals, the Green AL-INVEST program places special emphasis on compliance with Regulation (EU) 2023/1115, known as EUDR (*European Union Deforestation Regulation*), which establishes strict criteria to ensure that products imported into the European Union do not contribute to deforestation and meet sustainability standards.

Under these premises, the *Zero Deforestation Timber* project has been approved with the leadership of the **International Tropical Timber Technical Association (ATIBT)** and the participation of the **Tuumben Kooben** cooperative, in collaboration with the Ministry of Economic Development of Quintana Roo (SEDE) and the Ministry of Environment, Biodiversity and Climate Change of Campeche (SEMABICE). ATIBT is recognized for its work in the development of a sustainable tropical timber industry, ethical and aligned with local and international legislation, highlighting timber as a renewable resource essential for the socioeconomic development of producer countries.

The Yucatan Peninsula region, specifically the states of Campeche and Quintana Roo, is rich in biodiversity and has an extensive network of forest ejidos that play a fundamental role in environmental conservation and local economic development. These ejidos, considered pillars of sustainable forest management, face significant challenges in complying with international regulations and accessing high value-added markets.

In this context, the project's main objective is to **strengthen the productive and commercial capacities of forest ejidos**, promoting their **integration into sustainable value chains that meet the requirements of the European market**. To achieve this, the project will carry out the following specific activities between May 2025 and February 2026:

- Practical workshops for the implementation of *nearshoring* transformation models.
- Development of commercial actions to link forest ejidos and buyers for the European market.

This initiative represents a strategic step towards the consolidation of a more competitive and sustainable forestry sector oriented towards international markets.

2/ Purpose of the contract and specific tasks

The purpose of this bid is to contract a consulting firm (or a temporary association of firms) with experience in the forestry sector, international trade and ejido management in the Yucatan Peninsula, for the execution of the following key activities:

A. Workshop for the development of *nearshoring* transformation models (Activity A2.3):

The purpose of this workshop is to strengthen the transformation and adaptation capacity of ejidatarios by identifying and developing business models based on *nearshoring* transformation. This approach involves relocating or strengthening production in locations closer to destination markets, reducing logistics costs and facilitating access to international clients.

This process is expected to generate viable projects that will enable the ejidos to access international markets with higher value-added products, taking advantage of their productive potential and ensuring competitive integration into regional supply chains.

Specific tasks

The consultant shall coordinate and facilitate two workshops with participatory methodologies, targeting at least 20 ejidatarios, with the following key components:

- Diagnosis and identification of opportunities: Initial assessment to determine the feasibility of integrating ejidos into international value chains under productive transformation schemes.
- Development of innovation strategies: Implementation of tools to optimize production processes and add value to forest products.
- Exploration of financing mechanisms: Analysis and characterization of mixed financing schemes for project capitalization.
- Identification of bankable projects: Formulation of at least five projects oriented to the export of forest products with access to lines of support from the Secretariat of Economic Development of Quintana Roo.

Indicators of success:

- **20 ejidatarios** participated in the workshop.
- **5 viable *nearshoring*** projects identified and aligned with government assistance lines.

Methodology and approach:

The workshop will be based on the **LEAN** methodology, promoting the construction of agile and efficient business models. Presentation of basic concepts and diagnostic tools (e.g. Lean Canvas and SWOT analysis). Topics to be developed include:

1. Identification of *nearshoring* transformation opportunities - Use of brainstorming dynamics with the participation of producers, importers and local communities.
2. Development of the economic model - Application of visual tools to define the value proposition and financial structure of the business.
3. Identification of strategic allies - Mapping of key actors and determination of collaborative roles in the value chain.
4. Definition of commercial strategy - Preparation of pitches and simulations of business presentations.
5. Financing opportunities - Identification of sources of financial support, with emphasis on the programs of the Ministry of Economic Development of Quintana Roo.

B. Trade facilitation for export (Activity A3.1):

The objective of this activity is to identify opportunities for access to higher value-added markets for participating timber-producing ejidos in Campeche and Quintana Roo. The aim is to establish commercial links with buying companies that will facilitate the insertion of these actors in the European market.

The consultant in charge shall ensure that these opportunities comply with international regulations and sustainability standards, guaranteeing that the commercialization of timber products is aligned with global market requirements and contribute to strengthening the international value chain.

B.1 Business training for ejidos and MSMEs

Prior to the commercial meeting, the consultant must design and implement at least one training session for **20 ejidatarios**, with the objective of strengthening their capacities in key issues for the commercialization of forest products in international markets. The training will focus on:

- European market requirements: Applicable environmental and trade regulations, including EU Regulation 2023/1115.
- Sustainability and traceability certifications: Indispensable standards for forest product exports.
- International business processes: Strategies for effective negotiation with European buyers.

Indicators of success:

- **20 ejidatarios** trained in business and export skills.

Methodology and approach:

- Development of skills for the creation of an effective sales pitch.
- Preparation and organization of the necessary commercial material and documentation.
- Strategies for negotiation and communication in international environments.

B.2 Facilitation of business-to-business (B2B) meetings

The consultant shall organize at least one commercial event for at least **100 participants**, including ejidatarios, representatives of buying companies, government institutions, project members and other key stakeholders. This meeting will be designed to facilitate the connection between ejidos and potential buyers for the European market, promoting business opportunities and facilitating commercial opportunities.

Event activities

- **Convening of key players**, including purchasing companies for the European market, representatives of European markets, local sector companies, representatives of public administrations, among others.
- **Design and management of a program of activities**, which will include:
 - Technical and commercial presentations.
 - Negotiation tables and business rounds.
 - Spaces for the exchange of best practices.

Indicators of success:

- Organization of at least **1 business meeting** to reach at least **100 representatives**.

Methodology and approach:

- Development of an integral planning of the event, defining activities, times and roles.
- Advice on the creation of commercial presentations, highlighting the differentiating attributes of ejido products.
- Facilitation of business meetings, ensuring that the meetings are productive and aimed at generating commercial agreements.
- Implementation of evaluation mechanisms, including surveys and follow-up of post-event agreements. As well as the assignment of key people in the ejido to provide continuity to the commercial commitments acquired.

B.3 Business management and facilitation

The consultant will supervise and execute commercial actions that facilitate the effective linkage of ejidatarios with the European market. To this end, he/she will focus on identifying commercial opportunities, managing regulatory processes and supporting in the negotiation and formalization of agreements. Duties include:

- Development and accompaniment in the implementation of technical and regulatory procedures for the introduction of two new species in the market.
- Identification and connection with potential buyers for European Union markets interested in Mexican tropical timber.
- Supervision and support in the negotiation process and closing of commercial agreements.
- Management of the export process, ensuring compliance with trade regulations and environmental certifications.

Indicators of success:

- At least **3 expressions of interest** achieved between ejidos and potential buyers for the European market.

Methodology and approach:

- Analysis and segmentation of the European market, prioritizing clients aligned with the sustainability values of the project.
- Accompaniment during negotiations, providing support to ejidatarios during the closing of agreements.
- Post-sales follow-up strategy, ensuring the formalization and continuity of established commercial relationships.

3/ Duration of contract

The term of the contract will be **10 months**, beginning in May 2025 and ending in February 2026. No extension is contemplated. The activities must be carried out within the established timeframe, complying with the agreed deliverables and schedules.

4/ Place of execution of the work

The work will be carried out **in the states of Campeche and Quintana Roo**, in the Yucatan Peninsula region of Mexico. The consultant must demonstrate logistical and operational capacity in the region.

Consider that the language of the contract is **Spanish only**, bids received in another language or not accrediting a command of the Spanish language will be **automatically discarded**.

The consulting firm is required:

- Conduct face-to-face visits to the selected forest ejidos to ensure direct interaction with local stakeholders.
- Coordinate locally the activities related to training, *nearshoring* workshops and the organization of a business meeting.
- Supervise *on-site* the commercial, logistical and technical aspects required for the export of a container of Mexican tropical timber to the European Union.

5/ Budget

The maximum budget allocated for the execution of the work is **EUR 62,000**, excluding applicable taxes in accordance with current regulations. This budget shall cover:

- Professional fees of the consulting team.
- Logistical expenses, such as travel, per diem and materials necessary for the implementation of workshops and events.
- Technical resources for the facilitation of business meetings and compliance with export regulations.

The economic proposal must detail the breakdown of costs associated with each activity and guarantee the optimization of resources to meet the project's objectives.

6/ Deliverables and reports to be submitted

The contract contemplates the delivery of a series of products and reports that must evidence compliance with the objectives and scope of each activity. Each deliverable shall include documentation supporting the achievement of the success indicators, and shall be presented in digital format (PDF) and, when required, in physical format.

A. Deliverables from the Workshop for the Development of *Nearshoring* Transformation Models (Act. 2.3):

1. Initial work plan:

- Detailed chronogram with activities, dates, people in charge and workshop implementation methodology.
- Definition of impact indicators, in particular:
 - Number of participating ejidatarios (target: 20).
 - Number of viable projects to be developed (target: 5, with at least 5 ejidatarios)

involved in each).

2. Technical report of the workshop:

- Summary and analysis of the contents and dynamics of the two sessions.
- Detailed description of the application of the LEAN methodology, including:
 - Identification of *nearshoring* transformation opportunities.
 - Development of the economic model.
 - Identification of strategic allies.
 - Definition of commercial strategy.
 - Analysis of financing opportunities.
- Presentation of the results obtained, highlighting:
 - The participation of 20 ejidatarios.
 - Identification and formulation of 5 viable projects.
- Recommendations and lessons learned for future initiatives.

3. Follow-up and feedback documentation:

- Attendance records, evaluations and participant satisfaction surveys.
- Proposal for post-workshop follow-up to provide continuity to the identified projects (including periodic meetings and progress reports).

B. Export Trade Facilitation Deliverables (Act A3.1)

1. Pre-training report:

- Content and materials developed for the training of MSMEs, aimed at strengthening business skills (preparation of pitches, preparation of documentation, among others).
- Attendance record and evaluation of the session, with the goal of having 20 MSMEs participating.

2. Business-to-business (B2B) meeting report:

- Comprehensive documentation of the event, which should include:
 - Description of the day.
 - Details of the meetings held on the second day.
- Evidence to support the following indicators:
 - Total number of participants in business meetings: 100.
 - Number of business meetings held: At least 1.
 - Number of expressions of interest achieved: 3.

- Analysis of the effectiveness of the event in generating business linkages.

3. Post-event follow-up and monitoring report:

- Record of the support and accompaniment actions provided to MSMEs during the event.
- Follow-up on the agreements and expressions of interest generated, including an analysis of the continuity of the negotiations and recommendations to strengthen commercial ties in the future.

C. Impact Indicators and Overall Project Evaluation

1. Final impact report:

- Integration and comparative analysis of indicators achieved versus projected for each activity.
- Conclusions on the impact of the project, identifying successes, areas for improvement and recommendations for the continuity or replicability of the model.

2. Audit documentation and feedback:

- Compilation of internal and external evaluations carried out during the development of the project.
- Analysis of satisfaction surveys and qualitative feedback from all stakeholders involved (ejidatarios, invited companies and facilitators).

Format and Deadlines:

- Each deliverable must be submitted according to the schedule established in the initial work plan.
- The reports must have evidence annexes (photographs, attendance records, presentations, among others) that support the fulfillment of the objectives and indicators.
- Transparency and traceability of results will be ensured throughout all phases of the project.

7/ Work Plan and Evaluation Methodology

ACTIVITIES	TASKS	Jan-	Feb-	Mar-	Apr-	May	Jun-	Jul-	Aug-	sep-	Oct-	Nov-	Dec	Jan-	Feb-	Mar-	Apr-
		25	25	25	25	-25	25	25	25	25	25	25	-25	26	26	26	26
Activity A2.3 Workshop for the development of <i>nearshoring</i> transformation models	Preparation of the <i>nearshoring</i> workshop																
	Development of <i>nearshoring</i> workshops																
	Preparation and																

Activity A3.1 Export Trade Facilitation	Commercial training and initial connection with buyers		
	Business business meeting		
	Follow-up and formalization of commercial agreements		
	Export logistics coordination		
	Evaluation and closing of the contract		

To ensure the effectiveness of the project and the achievement of its objectives, a comprehensive evaluation system combining quantitative and qualitative criteria will be implemented:

Continuous evaluation and follow-up

- **Periodic meetings:** Follow-up sessions (monthly or at the end of each phase) will be held to review progress, identify challenges and propose adjustments.
- **Real-time monitoring:** This requires the recording of participation, quality of activities and immediate results (e.g. number of projects identified, attendance at trainings, etc.). The consultant will propose the mechanism for this to be done.

Feedback mechanisms

- **Surveys and evaluations:** Application of satisfaction questionnaires at the end of each session and event, to gather opinions and suggestions from participants.
- **Focus groups and interviews:** Collection of qualitative feedback through interviews and discussion sessions with key stakeholders (ejidatarios, facilitators and company representatives).
- **Analysis of meetings and agreements:** Evaluation of the impact of business rounds and follow-up after business meetings.

8/ Profile of consultants required

The consulting team should be composed of highly qualified professionals with proven experience in the key areas of the project. The minimum required profiles are as follows:

Profile	Professional Experience
Project coordinator	<ul style="list-style-type: none"> • At least five years of experience leading territorial development and sustainability projects in Mexico. • Knowledge and experience in traceability systems, international trade and territorial dynamics of the Mexican ejido system.

	<ul style="list-style-type: none"> • Experience in managing multidisciplinary projects with tangible results in rural and community contexts. • In-depth knowledge of the Mexican forestry sector, with special emphasis on the productive and social dynamics of Campeche and Quintana Roo. • Experience in financing and business development strategies oriented to international markets.
International Trade Specialist	<ul style="list-style-type: none"> • Experience in the design and implementation of international commercial strategies, with emphasis on the European market. • Track record in negotiation and formalization of contracts for forest products or related sectors. • Knowledge in the logistics management of international shipments, ensuring compliance with regulatory and commercial standards. • Familiarity with key regulations, such as EU Regulation 2023/1115. • Ability to dynamize commercial spaces and resolve conflicts in negotiation environments.
Specialist in territorial articulation	<ul style="list-style-type: none"> • At least 5 years of experience with local communities, forest ejidos and collectives in Campeche and Quintana Roo. • Sound knowledge of national and international regulations on sustainable forest management. • Ability to coordinate field activities, event logistics and materials management. • Experience in interaction and articulation with local stakeholders, including community authorities, civil organizations and public institutions of the territory. • In-depth knowledge of the territory, its local networks, socio-cultural dynamics and logistical resources.

9/ Submission of bids and award procedure

Proposals should be sent in PDF format to the ATIBT Secretariat e-mail address: secretariat.admin@atibt.org. The deadline for receipt of bids is **April 14, 2025 at 23:59 h (CET)**. Bids received after the deadline will not be considered.

Required documentation:

- **Detailed budget:** Breakdown of costs associated with the two main lines of the project: *nearshoring* transformation workshop and trade and export facilitation.
- **Company presentation:** Relevant experience in similar projects, with emphasis on technical knowledge and previous work in Campeche and Quintana Roo. Including profile of the assigned team and resumes of the main consultants.

- **Letter of commitment:** Declaration of availability of the team to travel and operate in the regions indicated. As well as guarantee of compliance with the dates, tasks and standards established in the contract.

In the case of a temporary association of companies, the association agreement signed by the parties will be required, including the distribution of tasks and budget and the assignment of a lead company, ultimately responsible for the execution and dialogue with ATIBT.

The proposals will be valid until the resolution of the bidding process. In case of significant changes in the rules or conditions of the project, the process will be repeated, leaving the previous bids without effect.

10/ Award criteria

The evaluation of bids will be based on two main components, with a maximum total of 100 points.

Financial offer (25 pts.)

The budget will have a weight of **25 points**, and the score will be calculated using the formula:

$$P_i = P \cdot O_m / O_i$$

P_i = points of bid i

P = price criterion points

O_i = bid price i

O_m = best bid price

Abnormally low or reckless bids shall be rejected. An abnormally low or reckless bid shall be considered to be that which is lower by more than 20% with respect to another bid submitted and, at the same time, lower by more than 10% with respect to the arithmetic average of the bids submitted.

Technical offer (75 pts.)

The technical evaluation will have a weight of **75 points**. The evaluation will be divided into two main categories:

Quality of the technical proposal (20 pts.): The quality, coherence and relevance of the technical proposal submitted will be evaluated. Maximum 3 pages:

Evaluation criteria	Score
Methodology proposed for the project activities: clarity, adequacy and detail in the design	10 pts.

of the activities (nearshoring transformation workshop and commercial facilitation).	
Innovation in the strategies proposed: Innovative approaches that guarantee the success of activities and the effective integration of ejidos into international markets.	5 pts.
Timeline and work plan: Feasibility, clarity and alignment of the timeline with the project objectives.	5 pts.

Experience of the company and work team (55 pts.)

Evaluation criteria	Score
a) Company experience (40 pts.)	
The organization's experience in sustainability, forest management and international trade projects, with a special focus on Campeche and Quintana Roo.	8 pts.
Knowledge and experience in the compliance and application of international regulations, such as the EUDR Regulation, and in sustainability certifications (FSC, PEFC, among others).	8 pts.
Proven experience with public and federal institutions in Quintana Roo related to foreign trade.	8 pts.
Knowledge of the ejido system in Mexico and at least 5 years of experience in working and liaising with this type of organizations.	8 pts.
Proven relationships at the European level to mobilize companies in the timber sector to the identified opportunities.	8 pts.
a) Work team (15 pts.)	
Project Coordinator: Proven experience in the management of sustainability and territorial development projects, especially in the Yucatan Peninsula for at least 5 years.	5 pts.
Specialist with more than 5 years of experience in international trade: Experience in exports to European markets, mastery of regulations such as the EUDR Regulation and skills in international logistics management.	5 pts.
Territorial articulation specialist: Operational experience in Campeche and Quintana Roo, with the ability to coordinate logistical activities and the organization of field events.	5 pts.

11/ Invoicing and payment terms

The service provider will invoice its services according to the fulfillment of the deliverables, in accordance with the following payment schedule:

Payment period	Product	Concept	%	Amount (EUR)
1st	Initial work plan	Detailed timeline and implementation strategy	20%	12.400,00
2nd	Nearshoring Transformation	Identification of bankable projects	30%	18.600,00

	Workshop Technical Report	and analysis of nearshoring opportunities		
3rd	Reports of training sessions and trade facilitation program	Technical training and business planning	30%	18.600,00
4th	Final report of the commercial meeting and export process	B2B event results, trade agreements and export compliance and logistics	20%	12.400,00

Terms of payment:

1. Payments will be made upon presentation and acceptance of the corresponding products, complying with the standards specified in the terms of reference.
2. Payments shall be made within 45 working days after receipt of the invoices issued by the supplier.
3. Invoices shall detail the items related to the specific deliverables, in accordance with the established payment schedule.
4. In the event that a product does not meet the required standards, the supplier will be notified to make the necessary adjustments prior to approval and payment.

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