

17/10/2024

## Request for quotation (RFQ) – UK PACT Expert Deployment

RFQ title	Social Behaviour Change Communication for Sustainable Transport in Bangkok Metropolitan Area
RFQ issue date	17/10/2024
Project title	Social Behaviour Change Communication for Sustainable Transport in Bangkok Metropolitan Area
Close date and time	07/11/2024 14:00 GMT
Details for submission	<a href="mailto:Expertdeployments@ukpact.co.uk">Expertdeployments@ukpact.co.uk</a>

Palladium as the delivery partner for the Foreign, Commonwealth and Development Office (FCDO) funded UK Partnering for Accelerate Climate Transitions (UK PACT) programme invites you to submit a quotation for the services detailed in this RFQ.

Please forward your quote in accordance with the Details for Submission above by the Close Date and Time. This RFQ includes the following materials:

Schedule 1 – Terms of Reference

Schedule 2 – Instructions for submission

Schedule 3 – Terms and Conditions

Annex I – RFQ Response Form

Annex II – Budget and workplan template

We look forward to your response.

## Schedule 1 - Terms of Reference

### 1.1. Overview of requirements

Name of project	Social Behaviour Change Communication for Sustainable Transport in Bangkok Metropolitan Area
Country/region	Thailand
Proposed start date	02/12/2024
Proposed end date	31/10/2025

### 1.2 Context and scope of work

#### Background

Addressing climate change and reducing carbon emissions are critical priorities for Thailand, particularly in sectors like energy, transport, and urban development. These efforts align with the global commitment to mitigate the impacts of climate change, emphasizing the need for cross-sectoral collaboration. Effective capacity building is essential for a wide range of stakeholders, including governmental agencies such as the Ministry of Natural Resources and Environment (MONRE), the Ministry of Interior (MOI), and relevant NGOs, to drive this transition. By equipping institutions and communities with the tools and strategies to implement sustainable practices, Thailand can accelerate its progress toward carbon neutrality and climate resilience.

Under the Nationally Determined Contribution (NDC), the energy and transport sectors have been identified as priority areas for developing long-term mitigation measures in Thailand's NDC Roadmap. Recognizing their importance is crucial for supporting the transition to sustainable transport and achieving carbon neutrality by 2065. It is essential to ensure that sustainable transport initiatives are supported by effective infrastructure, with pull policies and incentives complementing push policies and disincentives.

For both pull and push policies, early engagement with citizens is vital to garner support for innovative measures. These include information and communication strategies to engage the public, organizing awareness campaigns aimed at influencing travel choices, promoting active modes of transport, and reducing reliance on private vehicles. Such measures underscore the need for social behaviour change communication (SBCC).

Currently, the OTP and BMA are prioritizing congestion charging as a key push policy. This aligns with national plans, highlighting the need to explore options for designing

and implementing SBCC strategies to prevent backlash against the congestion charge.

## Objectives

The purpose of this RFQ is to identify a supplier to deliver activities that will contribute to the upcoming primary portfolio on sustainable transport. The goal is to ensure the development of comprehensive policy recommendations that consider both the technical and social aspects of sustainable transport. This approach is expected to enhance the likelihood of successful implementation of transport policies, supporting the achievement of key outcomes within the portfolio.

The selected supplier will initially provide support over an 11-month period, working alongside all new projects within the core portfolio. The continuation of support beyond this period will be reassessed at the end of the first year. The supplier's responsibilities will be divided into two distinct phases:

- **Phase 1: Dec 2024 – Feb 2025**
  - **Inception, Capacity Assessment, and Baselineing**

This phase includes one workshop in 2024 to introduce the concept of Social and Behaviour Change Communication (SBCC) in urban transport to the counterpart and key stakeholders. The workshop will aim to assess their knowledge and capacity baseline. Additionally, it will provide early support to the Office of Transport Planning (OTP) to initiate a public campaign by early 2025, with follow-up capacity-building workshops conducted as needed between Nov 2024 and Feb 2025.
- **Phase 2: Mar 2025 – Oct 2025**
  - **Development, Policy Recommendation, and Implementation**

During this phase, the supplier will develop and finalize policy recommendations, alongside an implementation and action plan for the SBCC strategy. Follow-up capacity-building workshops will be conducted, as agreed with OTP, to support the rollout of the strategy.

## Language Requirement

In order to ensure effective knowledge transfer, capacity building workshops need to be conducted in Thai.

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## Approach

The supplier is expected to complete the delivery plan by achieving the following key deliverables:

1. Capacity building to OTP & BMA on international and regional best practices and experience of SBCC
2. Baseline data of public perception on congestion charging, or any other priority transport policy to be agreed with OTP & BMA
3. Recommendations on SBCC strategy for OTP & BMA, including testing and piloting communications/ campaign activities
4. Rolling out one pilot public campaign and subsequently monitoring and evaluating its reach and effectiveness to further inform SBCC strategy
5. Implementation & action plan for SBCC strategy
6. Specific analysis on Gender Equality, Disability & Social Inclusion aspect of SBCC for congestion charging
7. And in the process of delivering the above – a convening role for OTP and BMA with key actors, which may include influential civil society organisations & relevant community groups (including representatives from vulnerable groups)

### 1.3 Key outputs and timeline

Output	Description	Latest submission	Acceptance criteria/sign-off
Phase 1 - Inception & baselining workshop	This first workshop should be designed as a combination of validating the scope of support that has been set out in this RFQ, baselining the level of capacity of key counterparts in their understanding of SBCC, as well as delivering basic materials to provide a generic understanding of SBCC in the transport sector.	31 December 2024	Submission of workshop delivery report.  Agreement on final schedule of project outputs

Phase 1 - Inception report	This report should summarise initial counterpart consultation including more detailed understanding of their baseline capacity on SBCC topic that will feed into further capacity building design and staging of piloting and policy recommendations.	31 December 2024	Submission of final inception report that has incorporated input and comments from UK PACT Thailand team.
Phase 2 - Key outputs	Indicative key outputs for Phase 2 are listed below which will be further agreed and refined during the inception period: <ul style="list-style-type: none"> <li>a. SBCC training modules on international &amp; regional best practices tailored based on needs assessment during inception period</li> <li>b. Report on baseline public perception on congestion charging</li> <li>c. Public campaign pilot design, delivery &amp; evaluation</li> <li>d. Overall SBCC strategy &amp; implementation plan document for OTP &amp; BMA</li> </ul>	As agreed during the inception phase	Submission of output documentation that is reviewed and accepted by counterpart
Monthly reports	This reporting should include a monthly progress report and a financial report. Any relevant draft	5 working days after the end of	Submission of a monthly progress report and financial report.

	or finalised key outputs relevant to an elapsing quarter should be annexed as part of this report.	previous month	Invoices can be submitted for payment once the financial report has been approved by UK PACT.
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#### 1.4 Required expert qualifications and experience

A team of technical experts and project management support to be proposed in the bid. The number of experts provided in this document is indicative and bidders can propose a different team composition but should cover at the minimum the following expertise.

- Behavioral Science in Mobility - Knowledge of the psychological and social factors that influence transport behaviors, such as convenience, cost, time, comfort, and environmental impact. Insights from behavioral economics and psychology (e.g., nudging, habit formation) help in designing campaigns to encourage public transit use, carpooling, or biking.
- Transportation Policy and Urban Planning - Familiarity with Thailand's transportation policies, regulations, and initiatives, including environmental and sustainability goals, to craft communication strategies that support government objectives.
- Audience Research and Segmentation - Skills in identifying and understanding diverse user groups within urban populations (e.g., daily commuters, students, low-income workers). Urban areas often have heterogeneous populations with varied transportation needs and habits, requiring tailored messaging.
- Environmental Sustainability - Expertise in promoting sustainable urban transport, such as reducing carbon emissions, encouraging public transit use, and promoting non-motorized transport options like cycling and walking.
- Technology and Innovation in Transport - Awareness of the latest trends in smart transportation, ride-sharing apps, electric vehicles, and other innovations that can influence behavior change. Understanding how digital

tools and data can be leveraged to communicate with urban commuters is essential.

- **Media and Communication Channels** - Knowledge of how to use mass media, social media, and digital platforms (e.g., mobile apps, geo-targeted messages) to reach urban populations. Urban dwellers often have access to multiple communication channels, so a multichannel approach is important.
- **Stakeholder Engagement and Advocacy** - Ability to collaborate with transport authorities, city planners, private transportation companies, and local communities to build support for initiatives. Coordinating with government agencies, NGOs, and citizen groups is key to a successful SBCC program.
- **Campaign Design and Creative Expertise** - Proficiency in designing visually compelling and clear messaging (posters, ads, videos) that highlight benefits like cost savings, time efficiency, environmental impact, or health improvements from changes in transportation behavior.
- **Monitoring and Evaluation (M&E)** - Expertise in measuring the effectiveness of SBCC interventions in transport, including changes in travel habits (e.g., increased use of public transport), reduced emissions, or better traffic flow. This involves designing indicators and collecting data on user behavior.
- **Cultural and Social Sensitivity** - Understanding the cultural and social dimensions of transportation in a specific urban area, including gender and safety concerns, affordability, and accessibility issues.

We expect bidders to refer to the following expertise and experience level:

1. Principal expert - minimum 15 years experience
2. Senior expert - minimum 10 years experience
3. Expert – minimum 7 years experience
4. Assistant expert – minimum 2 years experience
5. Project manager – minimum 3 years experience

The Principal and Senior experts are expected to have experience in facilitating and delivering courses/trainings for public officials within their field of expertise. Proven professional experience of working in Thailand is mandatory.

**Note that in order to ensure effectiveness of knowledge transfer, capacity building workshops need to be conducted in Thai.**

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## 1.5 Reporting requirements

The supplier will be required to align with UK PACT monitoring and reporting governance framework which includes:

- Monthly progress reporting on outputs
- A mid-project review to evaluate progress, delivery and outputs
- Project completion report

Project-specific reporting includes:

- Submission of workshop documentation and report, following the timeline in 1.3
  - An inception report and refined workplan
  - SBCC training modules on international & regional best practices tailored based on the needs assessment completed during the inception period
  - Report on baseline public perception on congestion charging
  - Submission of public campaign pilot design, delivery & evaluation documentation
  - Submission of final implementation & action plan for SBCC strategy
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## 1.6 Budget and contracting

The maximum budget is GBP 300,000 for the period set out in this terms of reference which should include personnel (both technical experts & project management team) as well as expenses.

The allocated budget availability is broken down as follows:

Dec 2024 – Mar 2025 – GBP 100,000

Apr 2025 – Oct 2025 – GBP 200,000

Expenses should cover logistics, venue, interpretation & translation services, travel & accommodations of delivery team, as well as training participants.

It is estimated that 25-30% of the budget will be for these expenses. The supplier must provide a breakdown of budgeted personnel and expenses using Annex II.

The successful supplier having passed the requisite due diligence checks will enter into a subcontractor agreement with Palladium for the delivery of these services on a time and materials basis. The agreement will include a milestone payment structure with 30% of personnel fees withheld against agreed deliverables. The



exact milestone structure will be agreed between both parties during contract mobilisation.

The supplier will submit a monthly invoice, forecast and progress update.

## Schedule 2 – Instructions for submission

### 2.1 Submission process

#### *Timeline*

Stage	Date
1. Terms of Reference (ToR) and application process launched	17/10/2024
2. Deadline for receipt of clarification questions	23/10/2024
3. Deadline for submission of applications	07/11/2024
4. Applicants notified of project selection	12/11/2024
5. Due diligence complete	25/11/2024
6. Agreement signature	29/11/2024

#### *Applicant guidance*

Interested suppliers should complete and submit the below documents to [expertdeployments@ukpact.co.uk](mailto:expertdeployments@ukpact.co.uk) with the subject line: **RFQ Submission – [Supplier name] Thailand SBCC**

- RFQ Response form
- Budget and Workplan Template
- CVs of key experts or personnel (max two pages per CV)

Please note the following key dates:

- **Deadline for Queries:** 23/10/2024 (23:59 GMT)
- **Submission Deadline:** 07/11/2024 (14:00 GMT)

### 2.2 Evaluation criteria

Criteria	Category	Weighting
Technical	Approach and methodology	30%
	Personnel	50%
Commercial	Competitiveness of the supplier's personnel cost	20%
<b>Total</b>		<b>100%</b>

### 2.2.1 Technical evaluation

The technical criteria will be evaluated by the procurement panel using the scale detailed below:

Score	Description
5 (Excellent)	Demonstrates an expert understanding of the project and proposes excellent and accurate solutions which address all requirements, and which are innovative where appropriate. Responses are excellently tailored to the context in all aspects. The level of detail and quality of information provides the highest degree of confidence in the ability to deliver.
4 (Very Good)	Demonstrates a very good understanding of the topic relating to delivery of the project. Responses are relevantly tailored to the context in the majority of aspects. There is sufficient detail and quality of information to give a strong level of confidence that they will deliver.
3 (Good)	Demonstrates a good understanding of the topic relating to the delivery of the project. Responses are reasonably tailored to the context for many of the aspects. There is a good level of detail and quality to give a good level of confidence that they will deliver.
2 (Satisfactory)	Demonstrates a satisfactory understanding of the topic relating to delivery of the project. Some appetite to tailor to context where required. Provides a limited level of detail and the quality of information provided gives only some level of confidence that they will be able to deliver satisfactorily.
1 (Unsatisfactory)	Demonstrates a poor understanding of the topic relating to delivery of the project. Poor tailoring to the context where this is required. Generally, an unsatisfactory and a low level of quality information and detail, leading to a low level of confidence that they will deliver.
0 (Fail)	Failure to address the material requirements of the project. No tailoring of responses to meet the context. No quality responses providing no confidence that they will deliver.

### 2.2.2 Commercial evaluation

The commercial evaluation will be conducted using the total personnel cost quoted in the Schedule III - Budget and Workplan (Cell W15 of "Budget Summary" sheet).

Supplier scores will be calculated relative to the lowest price supplier using the formula below:

*((Personnel cost of lowest price supplier/personnel cost of supplier) \*price weighting 20%)*

Where required, a Best And Final Offer process may be used to differentiate between suppliers of equal scoring.

## Schedule 3 - Terms and Conditions

### 1. Quote conditions

By submitting a quote, potential suppliers are bound by these terms and conditions. Potential suppliers must submit offers with all details provided in English and with prices quoted in GBP.

### 2. Quote Lodgement

The Company may grant extensions to the Closing Time at its discretion. The Company will not consider any quotes received after the Closing Time specified in the RFQ unless the Company determines to do so otherwise at its sole discretion.

### 3. Evaluation

The Company will evaluate submissions in line with the criteria provided in the RFQ to confirm compliance with this RFQ and to determine the best quote in the circumstances. The Company reserves the right to reject incomplete or abnormally low quotations.

### 4. Alterations

The Company may decline to consider a quote in which there are alterations, erasures, illegibility, ambiguity or incomplete details.

### 5. The Company's Rights

The Company may, at its discretion, discontinue the RFQ; decline to accept any quote; terminate, extend or vary its selection process; decline to issue any contract; seek information or negotiate with any potential supplier that has not been invited to submit a Quote; satisfy its requirement separately from the RFQ process; terminate negotiations at any time and commence negotiations with any other potential supplier; evaluate quotes as the Company sees appropriate (including with reference to information provided by the prospective supplier or from a third party); and negotiate with any one or more potential suppliers

### 6. Amendments and Queries

The Company may amend or clarify any aspect of the RFQ prior to the RFQ Closing Time by issuing an amendment to the RFQ in the same manner as the original RFQ was distributed. Such amendments or clarifications will, as far as is practicable be issued simultaneously to all parties. Any queries regarding this RFQ should be directed to the Contact Person identified on the cover page of this RFQ.

### 7. Clarification

The Company may, at any time prior to execution of a contract, seek clarification or additional information from, and enter into discussions and negotiations with, any or all potential suppliers in relation to their quotes. In doing so, the Company will not allow any potential supplier to substantially tailor or amend their quote.

### 8. Confidentiality

In their quote, potential suppliers must identify any aspects of their quote that they consider should be kept confidential, with reasons. Potential suppliers should note that the Company will only agree to treat information as confidential in cases that it considers appropriate. In the absence of such an agreement, potential suppliers acknowledge that the Company has the right

to disclose the information contained in their quote. The potential supplier acknowledges that in the course of this RFQ, it may become acquainted with or have access to the Company's Confidential Information (including the existence and terms of this RFQ and the TOR). It agrees to maintain the confidence of the Confidential Information and to prevent its unauthorised disclosure to any other person. If the potential supplier is required to disclose Confidential Information due to a relevant law or legal proceedings, it will provide reasonable notice of such disclosure to the Company. The parties agree that this obligation applies during the RFQ and after the completion of the process.

**9. Alternatives**

Potential suppliers may submit quotes for alternative methods of addressing the Company's requirement described in the RFQ where the option to do so was stated in the RFQ or agreed in writing with the Company prior to the RFQ Closing Time. Potential suppliers are responsible for providing a sufficient level of detail about the alternative solution to enable its evaluation.

**10. Reference Material**

If the RFQ references any other materials including, but not limited to, reports, plans, drawings, samples or other reference material, the potential supplier is responsible for obtaining the referenced material and considering it in framing their quote. And provide it to the Company upon request.

**11. Price Basis**

Prices quoted must be provided as a fixed maximum price and show the tax exclusive price, the tax component and the tax inclusive price. The contract price, which must include any and all taxes, supplier charges and costs, will be the maximum price payable by the Company for Services.

**12. Financial Information**

If requested by the Company, potential suppliers must be able to demonstrate their financial stability and ability to remain viable as a provider of the Services over the term of any agreement. If requested by the Company, the potential supplier must promptly provide the Company with such information or documentation as the Company reasonably requires in order to evaluate the potential supplier's financial stability.

**13. Referees**

The Company reserves the right to contact the potential supplier's referees, or any other person, directly and without notifying the potential supplier.

**14. Conflict of interest**

Potential suppliers must notify the Company immediately if any actual, potential or perceived conflict of interest arises (a perceived conflict of interest is one in which a reasonable person would think that the person's judgement and/or actions are likely to be compromised, whether due to a financial or personal interest (including those of family members) in the procurement or the Company).

**15. Inconsistencies**

If there is inconsistency between any of the parts of the RFQ the following order of precedence shall apply:

- (a) these Terms and Conditions.
- (b) the first page of this RFQ; and
- (c) the Schedule so that the provision in the higher ranked document will prevail to the extent of the inconsistency.

#### **16. Collusion and Unlawful Inducements**

Potential suppliers and their officers, employees, agents and advisors must not engage in any collusive, anti-competitive conduct or any other similar conduct with any other potential supplier or person or quote any unlawful inducements in relation to their quote or the RFQ process. Potential suppliers must disclose where quotes have been compiled with the assistance of current or former the Company employees (within the previous 9 months and who was substantially involved in the design, preparation, appraisal, review, and or daily management of this activity) and should note that this may exclude their quote from consideration. Potential suppliers warrant that they have not provided or offered any payment, gift, item, hospitality or any other benefit to the Company, its employees, consultants, agents, subcontractors (or any other person involved in the decision-making process relating to this RFQ) which could give rise to a perception of bribery or corruption in relation to the RFQ or any other dealings between the parties.

#### **17. Jurisdiction**

This Agreement shall be subject to the laws of the Jurisdiction. The Supplier and the Company will use their best efforts to settle amicably any dispute, controversy, or claim arising out of, or relating to this Agreement or the breach, termination, or invalidity thereof. If no agreeable settlement can be found, any dispute, controversy, or claim arising out of or relating to this Agreement or the breach, termination, or invalidity thereof, shall be settled by arbitration in accordance with the UNCITRAL Arbitration Rules in effect on the date of this Agreement. The appointing authority shall be the Secretary-General of the Permanent Court of Arbitration. The Parties will be bound by any arbitration award rendered as a result of such arbitration as the final adjudication of any such dispute. The place of arbitration shall be the headquarters location of Company at the time the claim is filed, and the language of the arbitration will be English. The relevant laws shall be the laws of the Jurisdiction.

#### **18. Compliance**

If your quote is successful, you will be required to enter into the Company's standard subcontractor agreement for the types of services being provided. In the provision of the Services, you will be required to comply with the Company's policies, including (without limitation) its Business Partner Code of Conduct and any relevant Project Manual. Potential suppliers must also comply with the Company's Business Partner Code of Conduct in the submission of any quotes pursuant to this RFQ. If you are bidding as part of a joint venture, partnership or similar, please make this clear in your submission. Likewise, if you propose to subcontract any part of the services provision, then disclose this fact within your submission. The Company may require additional information from you and approval for subcontracting will not be automatic as subcontractors will be subject to Palladium's Due Diligence process.

