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| **This project is funded**  **by the European Union** |

**REQUEST FOR PROPOSAL (RFP 31/2019)**

# Financing of the Municipalities and Fiscal Decentralization

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| Requesting Project: **EU financed project “Improving Municipal Governance”** | DATE: March 11, 2019 |
| REFERENCE: RFP 31/2019 for Financing of Municipalities and Fiscal Decentralization |

Dear Sir / Madam:

# We kindly invite you to submit your Proposal in mkd, VAT presented separately for for Financing of Municipalities and Fiscal Decentralization in a sealed envelope to the address below:

Please be guided by the form attached hereto as Annex 2, in preparing your Proposal.

Proposals may be submitted on or before **22 March 2019, 11am** to the address below:

[UNDP](mailto:........@undp.org)

**RFP 31/2019 for** **“Financing Municiplaities”**

Str. Jordan H.K.Drzinot 23,

1000 Skopje

PLEASE NOTE THAT **FINANCIAL OFFER** MUST BE SUBMITTED **IN A SEPARATE SEALED ENVELOPE**.

Companies failing to meet this requirement will be disqualified.

Your Proposal must be expressed in the English Language, and valid for a minimum period of 120 days.

In the course of preparing your Proposal, it shall remain your responsibility to ensure that it reaches the address above on or before the deadline. Proposals that are received by UNDP after the deadline indicated above, for whatever reason, shall not be considered for evaluation.

Services proposed shall be reviewed and evaluated based on completeness and compliance of the Proposal and responsiveness with the requirements of the RFP and all other annexes providing details of UNDP requirements.

The Proposal that complies with all of the requirements, meets all the evaluation criteria and offers the best value for money shall be selected and awarded the contract. Any offer that does not meet the requirements shall be rejected.

Any discrepancy between the unit price and the total price shall be re-computed by UNDP, and the unit price shall prevail and the total price shall be corrected. If the Service Provider does not accept the final price based on UNDP’s re-computation and correction of errors, its Proposal will be rejected.

No price variation due to escalation, inflation, fluctuation in exchange rates, or any other market factors shall be accepted by UNDP after it has received the Proposal. At the time of Award of Contract or Purchase Order, UNDP reserves the right to vary (increase or decrease) the quantity of services and/or goods, by up to a maximum twenty-five per cent (25%) of the total offer, without any change in the unit price or other terms and conditions.

Any Contract or Purchase Order that will be issued as a result of this RFP shall be subject to the General Terms and Conditions indicated herein. The mere act of submission of a Proposal implies that the Service Provider accepts without question the General Terms and Conditions of UNDP in this link: <http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html>

Please be advised that UNDP is not bound to accept any Proposal, nor award a contract or Purchase Order, nor be responsible for any costs associated with a Service Providers preparation and submission of a Proposal, regardless of the outcome or the manner of conducting the selection process.

UNDP’s vendor protest procedure is intended to afford an opportunity to appeal for persons or firms not awarded a Purchase Order or Contract in a competitive procurement process. **In the event that** you believe you have not been fairly treated, you can find detailed information about vendor protest procedures in the following link:

<http://www.undp.org/content/undp/en/home/operations/procurement/protestandsanctions/>

**UNDP encourages every prospective Service Provider to** prevent and avoid conflicts of interest, by disclosing to UNDP if you, or any of your affiliates or personnel, were involved in the preparation of the requirements, design, cost estimates, and other information used in this RFP.

UNDP implements a zero tolerance on fraud and other proscribed practices, and is committed to preventing, identifying and addressing all such acts and practices against UNDP, as well as third parties involved in UNDP activities. UNDP expects its Service Providers to adhere to the UN Supplier Code of Conduct found in this link : <http://www.un.org/depts/ptd/pdf/conduct_english.pdf>

**Thank you and we look forward to receiving your Proposal.**

**Description of Requirements**

|  |  |
| --- | --- |
| Implementing Partner of UNDP | Ministry of Finance, Ministry of Local Self-Government, ZELS |
| Brief Description of the Required Services | Financing of Municipalities and Fiscal Decentralization |
| List and Description of Expected Outputs to be Delivered | As per Terms of References – **Annex I** |
| Person to Supervise the Work/Performance of the Service Provider | UNDP Project Manger |
| Frequency of Reporting | *n/a* |
| Progress Reporting Requirements | As per the TOR |
| Expected duration of work | March 2019- September 2019 |
| Target start date | as of 29th March, 2019 |
| Travels Expected | It is the Contractor’s responsibility to anticipate and plan for necessary travel at their own expense. |
| Special Security Requirements | n/a |
| Facilities/services to be Provided by UNDP (i.e., must be excluded from Price Proposal) | **The workshops and the consultative events (under task 3 and task 4, i.e. deliverables 6, 7 and 8 will be financially covered, separately and directly by UNDP and shall not be included in the financial offer.** |
| Implementation Schedule indicating breakdown and timing of activities/sub-activities | Required |
| Qualifications of the Service Provider will be assessed based on the documents to be submitted: | 1. Company profile 2. Experience and Reference list of relevant projects 3. Methodology and approach 4. CV’s of experts (indicating the relevant projects/assignments)   and Availability Confirmation Form   1. The financial offer (in MKD) shall be VAT exempt |
| Currency of Proposal | MKD |
| Value Added Tax on Price Proposal | VAT presented separately |
| Validity Period of Proposals *(Counting for the last day of submission of quotes)* | 120 days  In exceptional circumstances, UNDP may request the Proposer to extend the validity of the Proposal beyond what has been initially indicated in this RFP. The Proposal shall then confirm the extension in writing, without any modification whatsoever on the Proposal. |
| Partial Quotes | Not permitted |
| Payment Terms[[1]](#footnote-1) | |  |  |  |  | | --- | --- | --- | --- | | Outputs | Percentage | Timing | Condition for Payment Release | | Deliverable 1 -2; |  |  | Payment will be lump sum, in two instalments. | | Deliverable 3-6 |  |  | | Deliverables 7-8 |  |  |  | |
| Person(s) to review/inspect/ approve outputs/completed services and authorize the disbursement of payment | Programme Analyst of UNDP |
| Criteria for Contract Award | Lowest Price Quote among technically responsive offers  Highest Combined Score (based on the 70% technical offer and 30% price weight distribution)  Full acceptance of the UNDP Contract General Terms and Conditions (GTC). This is a mandatory criteria and cannot be deleted regardless of the nature of services required. Non acceptance of the GTC may be grounds for the rejection of the Proposal. |
| Criteria for the Assessment of Proposal | **Combined Scoring**  **Technical Proposal (max. 700points)**  company profile  Methodology and approach  Proposed experts  **Financial Proposal (max.300 points)**  To be computed as a ratio of the Proposal’s offer to the lowest price among the proposals received by UNDP. (300 points)  The aggregate score will determine the contract award. |
| UNDP will award the contract to: | One and only one Service Provider  One or more Service Providers, depending on the following factors |
| Type of Contract to be Signed | de minimi contracts  Contract Face Sheet (Goods and-or Services)  Other Type/s of Contract |
| Contract General Terms and Conditions[[2]](#footnote-2) | General Terms and Conditions for contracts (goods and/or services)  General Terms and Conditions for de minimi contracts  Applicable Terms and Conditions are available at:  <http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html> |
| Annexes to this RFP[[3]](#footnote-3) | Detailed TOR (Annex 1)  Form for Submission of Proposal (Annex 2)  Evaluation Criteria (Annex 3) |
| Contact Person for Inquiries  (Written inquiries only)[[4]](#footnote-4) | *Procurement.mk@undp.org*    Any delay in UNDP’s response shall be not used as a reason for extending the deadline for submission, unless UNDP determines that such an extension is necessary and communicates a new deadline to the Proposers. |
| Other Information *[pls. specify]* |  |



**Annex 1**

# Terms of Reference

# Company

# Financing of the Municipalities and Fiscal Decentralization

**Project number & title:** 00089220 “Improving Municipal Governance”

**Post title/area:** Consultancy services for Fiscal Decentralization

**Location:**  Skopje, with frequent travel within the country

**Expected duration:**  March 2019- September 2019)

**Practice area:** Local Governance and Decentralization

**Languages:**  English

**Background**

UNDP is the development arm of the United Nations system, with offices in 180 countries. Globally the organization employs 17,000 people and manages a budget of USD 5 billion each year.

The UNDP office in Skopje employs a team of 65 and currently manages a portfolio of projects in environmental protection, good governance and social inclusion worth USD 15 million per year.

**UNDP is currently seeking to contract a company working on Fiscal Decentralization and financing of Municipalities. The Service provider needs to support the implementation of “Improving Municipal Governance” project in strengthening the financial management and revenue collection capacities of the 81 local-self-government units to deliver all necessary public services.**

The decentralization process that started in 2001 has devolved a wide range of responsibilities from central to local governments. However, many municipalities still struggle to provide adequate services to their constituents. They face a number of institutional, financial and human-resource constraints in the provision of local-level services. To address these challenges, EU and UNDP funded project ‘’Improving Municipal Governance” aims to improve people’s lives by helping municipal governments to secure the funds and develop the skills they need to deliver high-quality public services to residents of local communities. The project intends to do so by: 1) improving the monitoring, design and provision of already decentralized services; 2) helping municipalities undertake new services in line with inclusive local development plans; and 3) ensuring that municipalities can secure sufficient revenues to deliver all necessary public services.

As it is clear from the 2016 Report for Financing of the Local Self-Government Unit (prepared by UNDP twice a year using data from the Ministry of Finance) the municipalities remain highly dependent on transfers from central government, they still lack the necessary capacities for efficient tax collection and therefore cannot increase their fiscal autonomy. Revenues generated through local taxes account for just 26% of the total, meaning that they remain a marginal source of income. Municipalities face chronic lack of own funds which complicates resource planning at the municipal level. Further increase of the total municipal revenues requires optimization of the existing financial instruments and designing more substantial policy reform measures. In this regard, there is a clear need to support the municipalities to improve local public finance management and control, to enhance collection of local tax revenues and to optimize the use of existing local revenue instruments, and help municipalities introduce new ones.

Objective:

The aim of the assignment is to strengthen the institutional capacities of the municipalities and to support the municipal administration in improving financial operations and fiscal performances. For that purpose, a comprehensive needs assessment will be conducted to identify and understand the capacities of the municipal finance officers and a capacity development programme covering public financial management will be delivered to finance officers from all of the 81 municipalities.

To carry out this activities UNDP is currently seeking qualified consulting company who will work in close cooperation a of the International Consultant, engaged by UNDP to:

1. to conduct a comprehensive capacity needs assessment covering municipal financial management of all 81 municipalities;
2. to develop a Comprehensive Capacity Development Program for efficient collection of local tax revenues, stable financial management and internal financial control to all 80 LSGUs plus the City of Skopje;
3. to create a roaster of 8 national Public Finance Management experts’ trainers and conduct a two day “training for trainers” (ToT) workshop for the identified experts;
4. to deliver trainings for the financial officers from all 81 municipalities;
5. to assist the International Consultant in the preparation of Comparative analysis of the local revenue systems in EU countries;
6. to assist the International Consultant in the preparation of Feasibility Study on New and Applicable Municipal Revenue Instruments in the Country Context;
7. To support the International consultant in organization of a consultative event.

The selected consulting company will work under the supervision of the UNDP Project Manager and the general guidance of the UNDP Programme Analyst who will ensure that the consultancy services are provided in line with the overall objectives of the decentralization and local governance reform processes and sustainable development principles, as well as other relevant projects within the Governance Unit and relevant initiatives in other units in UNDP.

**Tasks (Scope of Work)**

The consulting company is expected to conduct the following tasks:

1. **To design and carry out a Needs Assessment on the capacities of financial offers of all municipalities -** The company is expected:

* To collect data and information from relevant stakeholders to assess capacity assets and map the capacity needs for efficient collection of local tax revenues, stable financial management and internal financial control in all 81 LSGUs;
* To engage relevant stakeholders (Ministry of Finance, Association of Financial officers, ZELS, Municipalities) in the design phase of the needs assessment and identify objectives and expectations with primary clients;
* Summarize and interpret results from the assessment and select four to five high-priority training models for the follow up action;

1. **To develop a Comprehensive Capacity Development Program for efficient collection of local tax revenues, stable financial management and internal financial control to all 80 LSGUs plus the City of Skopje**

* Design a Comprehensive Capacity Development Program and curriculum with training courses, briefs and manuals to respond to identified capacity priorities (in coordination with the relevant units/departments within the Ministry of Finance, UNDP and ZELS);
* Design a comprehensive Capacity Development Program that will be in line with the Capacity Building Program created for the councilors and thus build a synergy with the Empowering Municipal Councils Project[[5]](#footnote-5).
* Design a Capacity Development Program containing five priority training modules considered as priority for knowledge and skills transfer;
* To consult the international consultant when preparing the Programme as well as review and approve the Programme
* Define indicators for measuring the success of the capacity development response;
* Evaluate the success of the Programme against the set indicators;
* Share all training materials to the E-Knowledge Platform of the Ministry of Local Self-Government;

1. **To create a roster of 8 national experts/trainers and organize/deliver trainings for financial officers from all 81 municipalities**

* Create a Roster of 8 national experts/trainers in coordination with UNDP;
* Organize one workshop and deliver a ToT for the selected trainers;
* Organize trainings (16 workshops, four workshops for each of the four training modules) for all 81 municipalities with participation of minimum one finance officer per municipality;

1. **To assist the International Consultant in the preparation of Feasibility Study on New and Applicable Municipal Revenue Instruments in the Country Context**

The Study will identify and address the conceptual and procedural obstacles that stand in the way of the adoption of new municipal revenue instruments. The study will be prepared in a participatory manner through a consultative event with municipal stakeholders and policy recommendations will be provided to the Ministry of Finance.

**The company shall:**

* Shall work closely together with the International Consultant hired by UNDP in the process of preparation of the Capacity Development Program and the Feasibility Study on New and Applicable Municipal Revenue Instruments;
* Shall assist the International consultant in providing local knowledge as well as follow the guidance and methodology prepared by the International consultant;
* In coordination and consultation with the International consultant and UNDP shall organize one consultative event with stakeholders (two-day event with 60 participants, including rural and urban municipalities, representatives of the planning regions and the Ministry of finance and Ministry of local self-government)

**Deliverables**

1. Detailed work plan submitted for approval to UNDP, at the latest by April 05th 2019;

2. Methodology on conducting the Capacity Needs Assessment, at the latest by April 05th, 2019;

3. Final Capacity Needs Assessment, at the latest by April 25, 2019;

4. Final Comprehensive Capacity Development Program on Municipal Public Finance Management (*up to 50 pages*), at the latest by May 20, 2019;

5. A roaster of 8 national public finance management experts’ trainers, at the latest by May 25, 2019;

6. Two days ToT workshop for the identified 8 experts, 10th of June 2019;

7. Organized trainings (16 workshops, four workshops for each of the four training modules) for all 81 municipalities with participation of minimum one finance officer per municipality, by September 20, 2019;

8. Three reviews and inputs to the feasibility Study on New and Applicable Municipal Revenue Instruments in the Country Context (up to 100 pages), September 15, 2019

**Reporting**

Throughout the assignment, the consultant will work under direct supervision of the Project Manager. The detailed work plan with methodology and time-tale of activities will be agreed with the selected contractor, upon the finalization of the procurement process, as the dates per deliverables are approximate at this stage.

**Duration of assignment**

The assignment shall be completed in the period between March 2019 to September 2019.

**Travel**

The consultants are expected to travel throughout the country and make their own travel arrangements.

All costs related to this ToR: travel, accommodation, meals and refreshments should be included in the

all-inclusive financial offer in line with the proposed methodology.

**The workshops and the consultative events (under task 3 and task 4, i.e. deliverables 6, 7 and 8 will be financially covered, separately and directly by UNDP and shall not be included in the financial offer.**

**Financial offer:**

The financial offer shall be presented per deliverables, while each deliverable shall have detailed budget breakdown of costs.

**Payment schedule**

The payment of the Consultant on this project will be done in three installments:

* First payment after submitting Deliverables 1 and 2;
* Second payment after submitting Deliverable 3, 4, 5 and 6;
* Third payment after submitting Deliverable 7 and 8.

1. **Qualifications of the Service Provider will be assessed based on the documents to be submitted:**
2. Company profile;
3. Proposed methodology and a work plan;
4. Reference list of \*relevant researches/projects/assessment/ conducted trainings, organized workshops and consultative events in the past 5 years;
   1. Proven experience of a minimum of 5 years in consultancy in analysis, fiscal decentralization, researches in revenues, taxes, participatory budgeting, municipal financing, local public debt, E-accounting tools; (Include company profile with reference list of work and projects)
   2. Proven experience in developing and carrying out at least 3 relevant researches, projects/assessments over the past 5 years with similar complexity to this one; Provide reference list of relevant researches/projects/assessment.
   3. Demonstrated organizational competence and experience in policy research, high-quality data analysis and an outstanding track record of working on complex multidisciplinary projects; Provide reference list of relevant projects.
   4. Proven experience in working with national and/or local institutions, and with local governments;
   5. Proven experience of minimum 3 conducted trainings/ workshops or consultative events in the relevant area;
   6. Experience in working with international institutions will be an asset;

Fill in the table:

|  |  |  |  |
| --- | --- | --- | --- |
| **Client** | **Period of activity** | **Name the relevant researches/projects/assessment/ conducted trainings, organized workshops and consultative events in the past 5 years;** | **References Contact Details (Name, Phone, Email)** |
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1. CVs of experts indicating relevant projects and relevant experience

A team of at least 3 qualified experts with the following qualifications:

|  |  |
| --- | --- |
| Team members | Qualification requirements |
| **Team Leader** | * Minimum a master’s degree in economics, finance or other relevant fields * At least 7 years of relevant professional experience in policy research and analysis with a focus on analysis, fiscal decentralization, researches in revenues, taxes, participatory budgeting, municipal financing, local public debt, E-accounting tools (list of relevant projects/assignments shall be included) * Proven experience as a Project/Team Leader working on a minimum 5 relevant projects (list of relevant projects/assignments shall be included) * (Relevant projects: analysis, fiscal decentralization, researches in revenues, taxes, participatory budgeting, municipal financing, local public debt, E-accounting tools; organized trainings/workshops or consultative events |
| **Expert (x2)** | * Minimum university degree in law, public and business administration, economics or another relevant field. Advanced degree will be an asset. * At least 5 years of relevant professional experience in analysis, fiscal decentralization, researches in revenues, taxes, participatory budgeting, municipal financing, local public debt, e-accounting tools (list of relevant projects/assignments shall be included) * Proven experience on at least 3 relevant assignments/projects (list of relevant projects/assignments shall be included) * (Relevant projects: analysis, fiscal decentralization, researches in revenues, taxes, participatory budgeting, municipal financing, local public debt, E-accounting tools; organized trainings/workshops or consultative event) |

1. List of relevant projects conducted and delivered by the proposed Team Leader indicating his/her engagement as Project/Team leader.

\*(Relevant projects: analysis, fiscal decentralization, researches in revenues, taxes, participatory budgeting, municipal financing, local public debt, E-accounting tools)

**Please fill in the table below:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of expert** | **Years of experience/ Filed of expertise** | **Name the relevant projects** | **Working experience** |
|  |  |  |  |
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|  |  |  |  |

* 1. ***Availability confirmation form*** (to be filled by all proposed experts)

I \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (name, last name), agree that the entity \_\_\_\_\_\_\_\_\_\_\_\_\_ (name of the applicant entity) will use my CV for the tender application under this RFP

I declare that the information provided in my CV is accurate, and I am able to provide relevant evidence (reference letters, job contracts, etc.) upon request.

If the entity \_\_\_\_\_\_\_\_\_\_\_\_\_ (name of the applicant entity), is selected for contract, I agree to be available under the conditions given in the ToR.

Name and last name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(as in your ID document)

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Annex 2**

**FORM FOR SUBMITTING SERVICE PROVIDER’S PROPOSAL**

***(This Form must be submitted only using the Service Provider’s Official Letterhead/Stationery[[6]](#footnote-6))***

Skopje

March 11, 2019

To: UNDP Procurement Unit

Dear Sir/Madam:

# We, the undersigned, hereby offer to render the following services to UNDP in conformity with the requirements defined in the RFP 31/2019 for Financing of the Municipalities and Fiscal Decentralization dated 3/11/2019 , and all of its attachments, as well as the provisions of the UNDP General Contract Terms and Conditions:

**Qualification of the Service Provider**

*The Service Provider must describe and explain how and why they are the best entity that can deliver the requirements of UNDP*

**Proposed Methodology for the Completion of Services**

|  |
| --- |
| *The Service Provider must describe how it will address/deliver the demands of the RFP; providing a detailed description of the essential performance characteristics, reporting conditions and quality assurance mechanisms that will be put in place, while demonstrating that the proposed methodology will be appropriate to the local conditions and context of the work.* |

**Qualifications of Key Personnel**

*If required by the RFP, the Service Provider must provide:*

1. *Names and qualifications of the key personnel that will perform the services indicating who is Team Leader, who are supporting, etc.;*
2. *CVs demonstrating qualifications must be submitted if required by the RFP; and*
3. *Written confirmation from each personnel that they are available for the entire duration of the contract*

**Offer to Supply Services Compliant with TOR**

To: UNDP

Dear Sir/Madam:

# We, the undersigned, hereby accept in full the UNDP General Terms and Conditions, and hereby offer to deliver services in conformity with RFP 31/2019 for Financing of the Municipalities and Fiscal Decentralization

|  |  |  |
| --- | --- | --- |
| **Item No.** | **Description of services** | **Price in MKD, VAT excluded** |
| 1 | Deliverable 1 |  |
| 2 | Deliverable 2 |  |
| 3 | Deliverable 3 |  |
| 4 | Deliverable 4 |  |
| 5 | Deliverable 5 |  |
| 6 | Deliverable 6 |  |
| 7 | Deliverable 7 |  |
| 8 | Deliverable 8 |  |
| **TOTAL** | |  |

*\*This shall be the basis of the payment tranches*

*[Name and Signature of the Service Provider’s Authorized Person]*

*[Designation]*

**Annex 3: *Evaluation criteria***

A two-stage procedure is utilized in evaluating the proposals, with evaluation of the technical proposal being completed prior to any price proposal being opened and compared. The price proposals will be opened only for submissions that passed the minimum technical score of 70% of the obtainable score of 700 points in the evaluation of the technical proposals (expertise of the firm in similar projects, methodology and approach and qualifications of the staff with relevant experience) and the price has allocated 300 points.

Contract will be awarded to the company with the highest aggregate score based on technical and financial proposal.

**Technical Evaluation Criteria**

**Technical Evaluation**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Summary of Technical Proposal Evaluation Forms** | | **Score Weight** | **Points Obtainable** | **A** | **B** | **C** | **D** | **E** | **F** | **G** |
| 1. | Expertise of Firm / Organization |  | 200 |  |  |  |  |  |  |  |
| 2. | Proposed Methodology, Approach and Implementation Plan |  | 300 |  |  |  |  |  |  |  |
| 3. | Management Structure and Key Personnel |  | 200 |  |  |  |  |  |  |  |
|  | **Total** | | **700** |  |  |  |  |  |  |  |

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| Technical Proposal Evaluation  **Form 1** | | Maximum Points obtainable |
|
| **Expertise of the Firm/Organization** | | |
| 1.1 | * At least 7 years of relevant professional experience in analysis, fiscal decentralization, researches in revenues, taxes, participatory budgeting, municipal financing, local public debt, E-accounting tools | Max 50 |
| 1.2 | Proven experience in developing and carrying out at least 3 relevant research projects/assessments over the past 5 years with similar complexity to this one | Max 70 |
| 1.3 | Demonstrated organizational competence and experience in policy research, high-quality data analysis and an outstanding track record of working on complex multidisciplinary projects and proven experience in working with national and/or local institutions, and with local governments. | Max 60 |
| 1.4 | Proven experience in working with national and/or local institutions, and with local governments | Max 10 |
| 1.5 | Experience in working with international institutions is an asset (not a disqualifying criteria) | Max 10 |
|  | | **200** |

|  |  |  |
| --- | --- | --- |
| Technical Proposal Evaluation  **Form 2** | | Maximum Points obtainable |
| **Proposed Methodology, Approach and Implementation Plan** | | |
| 2.1 | To what degree does the Proposer understand the task? Is the scope of task well defined and does it correspond to the TOR? | Max 80 |
| 2.2 | Have the important aspects of the task been addressed in sufficient detail? | Max 40 |
| 2.3 | Is the proposal based on understanding the work and the project and was this data input properly used in the preparation of the proposal? | Max 90 |
| 2.4 | Is the presentation clear and is the sequence of activities and the planning logical, realistic and promise efficient implementation to the project? | Max 90 |
|  |  | **300** |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **3.1** | **Team Leader** |  |  | **Maximum obtainable points** |
| **Qualifications of the Team Leader/Expert 1** | | **YES/NO for minimum requirements** |  |  |
|  | Proven experience as a project/team Leader working on minimum 5 relevant projects |  | 5 projects | 30 |
| 6-8 projects | 35 |
| >8 projects | 40 |
| Educational background: Minimum a master’s degree in economics, finance or other relevant fields |  | Master’s degree | 10 |
| PhD | 20 |
| At least 7 years of relevant professional experience in analysis, fiscal decentralization, researches in revenues, taxes, participatory budgeting, municipal financing, local public debt, e-accounting tools |  | 7 years relevant professional experience | 30 |
| 8-10 years relevant professional experience | 35 |
| >10 years relevant professional experience | 40 |
|  | **Max points:** |  | **100** |
| **3.2** | **Expert 1** |  |  |  |
| **Qualifications of the experts** | | **YES/NO for minimum requirements** |  |  |
|  | Minimum University degree (Law, Public and Business administration, Economics, Political science, or another relevant field). Advanced degree will be an asset. |  | University degree | 5 |
| Master’s degree | 10 |
| At least 5 years of relevant professional experience in analysis, fiscal decentralization, researches in revenues, taxes, participatory budgeting, municipal financing, local public debt, E-accounting tools |  | 5 years relevant professional experience | 10 |
| 6-8 years relevant professional experience | 18 |
| >8 years relevant professional experience | 20 |
|  | Proven experience on at least 3 relevant assignments/projects.  (List of relevant projects/assignments shall be indicated) |  | 3 projects | 10 |
| 4-6 projects | 18 |
| >6 projects | 20 |
|  | **Max points:** |  | **50** |
| **3.2** | **Expert 2** |  |  |  |
| **Qualifications of the experts** | | **YES/NO for minimum requirements** |  |  |
|  | Minimum University degree (Law, Public and Business administration, Economics, Political science or another relevant field). Advanced degree will be an asset. |  | University degree | 5 |
| Master’s degree | 10 |
| At least 5 years of relevant professional experience in policy research and analysis with a focus on analysis, fiscal decentralization, researches in revenues, taxes, participatory budgeting, municipal financing, local public debt, E-accounting tool |  | 5 years relevant professional experience | 10 |
| 6-8 years relevant professional experience | 18 |
| >8 years relevant professional experience | 20 |
|  | Proven experience on at least 3 relevant assignments/projects.  (List of relevant projects/assignments shall be indicated) |  | 3 projects | 10 |
| 4-6 projects | 18 |
| >6 projects | 20 |
|  | **Max points:** |  | **50** |
|  | | | **200** |

Offeror’s response to the solicitation document is evaluated and points are attributed based on how well they meet the defined desirable criteria.

A proposal shall be considered non-responsive and rejected, if it fails to substantially satisfy the requirements of the TOR, or it fails to achieve a minimum technical score (70% of 700 points or 490 points) as specified in the RFP.

The price proposal of the Proposals will be opened only for submissions that passed the minimum technical score of 70% of the obtainable score of 700 points in the evaluation of the technical proposals.

The offer with the lowest price will receive the total 300 points. Other offers with higher prices will receive their respective scores according the following formula:

Lowest Bid

               ------------------- x 300

               Proposed Bid

The proposal will be awarded with the highest aggregate score based on technical and financial proposal. The remaining financial proposals of Offeror’s whose technical proposals are deemed unacceptable or unqualified shall remain unopened can be returned back to the vendor.

**Important note:** UNDP reserves the right to withdraw the Request for Proposals without making a selection during the selection process, having ascertained that the financial proposals submitted to this bid are exceeding the set ceiling for this assignment.

**Quality Control**

The Contractor should ensure an internal quality control during the implementing and reporting phase of the assignment. The quality control should ensure that the analyses and reports produced comply with the above requirements and meet adequate quality standards before sending them to UNDP for comments.

The quality control should ensure consistency and coherence between findings, conclusions and recommendations. It should also ensure that findings reported are duly substantiated and that conclusions are supported by relevant judgment criteria.

The views expressed in the report will be those of the contractor and will not necessarily reflect those of UNDP and EU. Therefore, a standard disclaimer reflecting this will be included in the report.

1. *UNDP preference is not to pay any amount in advance upon signing of contract. If the Service Provider strictly requires payment in advance, it will be limited only up to 20% of the total price quoted. For any higher percentage, or any amount advanced exceeding $30,000, UNDP shall require the Service Provider to submit a bank guarantee or bank cheque payable to UNDP, in the same amount as the payment advanced by UNDP to the Service Provider.* [↑](#footnote-ref-1)
2. *Service Providers are alerted that non-acceptance of the terms of the General Terms and Conditions (GTC) may be grounds for disqualification from this procurement process.*  [↑](#footnote-ref-2)
3. *Where the information is available in the web, a URL for the information may simply be provided.* [↑](#footnote-ref-3)
4. *This contact person and address is officially designated by UNDP. If inquiries are sent to other person/s or address/es, even if they are UNDP staff, UNDP shall have no obligation to respond nor can UNDP confirm that the query was received.* [↑](#footnote-ref-4)
5. Documents and materials about the Capacity Building Program of the Empowering Municipal Councils Project will be provided by UNDP accordingly [↑](#footnote-ref-5)
6. *Official Letterhead/Stationery must indicate contact details – addresses, email, phone and fax numbers – for verification purposes*  [↑](#footnote-ref-6)