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# REQUEST FOR PROPOSAL

## Development and Implementation of a climate resilient ICZM plan for the North Coast of Egypt

RFP No.: 001/2019

Project: Enhancing Climate Change Adaptation in the North Coast And Nile Delta Regions In Egypt

Country: Egypt

Issued on: 07/07/2019

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## 1. SECTION 1. LETTER OF INVITATION

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The United Nations Development Programme (UNDP) hereby invites you to submit a Proposal to this Request for Proposal (RFP) for the above-referenced subject.

This RFP includes the following documents and the General Terms and Conditions of Contract which is inserted in the Bid Data Sheet (BDS):

- Section 1: This Letter of Invitation
- Section 2: Instruction to Bidders
- Section 3: Bid Data Sheet (BDS)
- Section 4: Evaluation Criteria
- Section 5: Terms of Reference
- Section 6: Returnable Bidding Forms
  - o Form A: Technical Proposal Submission Form
  - o Form B: Bidder Information Form
  - o Form C: Joint Venture/Consortium/Association Information Form
  - o Form D: Qualification Form
  - o Form E: Format of Technical Proposal
  - o Form F: Financial Proposal Submission Form
  - o Form G: Financial Proposal Form

If you are interested in submitting a Proposal in response to this RFP, please prepare your Proposal in accordance with the requirements and procedure as set out in this RFP and submit it by the Deadline for Submission of Proposals set out in Bid Data Sheet.

Please acknowledge receipt of this RFP by sending an email to [procurementnotice.egypt@undp.org](mailto:procurementnotice.egypt@undp.org) indicating whether you intend to submit a Proposal or otherwise. You may also utilize the "Accept Invitation" function in eTendering system, where applicable. This will enable you to receive amendments or updates to the RFP. Should you require further clarifications, kindly communicate with the contact person/s identified in the attached Bid Data Sheet as the focal point for queries on this RFP. UNDP looks forward to receiving your Proposal and thank you in advance for your interest in UNDP procurement opportunities.

Issued by:

Approved by:

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Name: Dr Mohamed Ahmed Ali

Title: ECCADP Project Manager

Date: 07/07/2019

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Name: Dr Mohamed Bayoumi

Title: UNDP Project Officer

Date: 07/07/2019

## 2. SECTION 2. INSTRUCTION TO BIDDERS

<b>A. GENERAL PROVISIONS</b>	
<b>1. Introduction</b>	<p><b>1.1</b> Bidders shall adhere to all the requirements of this RFP, including any amendments in writing by UNDP or the Project Management Unit (PMU). This RFP is conducted in accordance with the UNDP Programme and Operations Policies and Procedures (POPP) on Contracts and Procurement which can be accessed at <a href="https://popp.undp.org/SitePages/POPPBSUnit.aspx?TermID=254a9f96-b883-476a-8ef8-e81f93a2b38d">https://popp.undp.org/SitePages/POPPBSUnit.aspx?TermID=254a9f96-b883-476a-8ef8-e81f93a2b38d</a></p> <p><b>1.2</b> Any Proposal submitted will be regarded as an offer by the Bidder and does not constitute or imply the acceptance of the Proposal by UNDP or the PMU. UNDP is under no obligation to award a contract to any Bidder as a result of this RFP.</p> <p><b>1.3</b> As part of the bid, it is desired that the Bidder registers at the United Nations Global Marketplace (UNGM) website (<a href="http://www.ungm.org">www.ungm.org</a>). The Bidder may still submit a bid even if not registered with the UNGM. However, if the Bidder is selected for contract award, the Bidder must register on the UNGM prior to contract signature.</p>
<b>2. Fraud &amp; Corruption, Gifts and Hospitality</b>	<p><b>2.1</b> UNDP strictly enforces a policy of zero tolerance on proscribed practices, including fraud, corruption, collusion, unethical or unprofessional practices, and obstruction of UNDP vendors and requires all bidders/vendors observe the highest standard of ethics during the procurement process and contract implementation. UNDP's Anti-Fraud Policy can be found at <a href="http://www.undp.org/content/undp/en/home/operations/accountability/audit/office_of_audit_andinvestigation.html#anti">http://www.undp.org/content/undp/en/home/operations/accountability/audit/office_of_audit_andinvestigation.html#anti</a></p> <p><b>2.2</b> Bidders/vendors shall not offer gifts or hospitality of any kind to UNDP or PMU staff members including recreational trips to sporting or cultural events, theme parks or offers of holidays, transportation, or invitations to extravagant lunches or dinners.</p> <p><b>2.3</b> In pursuance of this policy, UNDP  (a) Shall reject a proposal if it determines that the selected bidder has engaged in any corrupt or fraudulent practices in competing for the contract in question;  (b) Shall declare a vendor ineligible, either indefinitely or for a stated period of time, to be awarded a contract if at any time it determines that the vendor has engaged in any corrupt or fraudulent practices in competing for, or in executing a UNDP contract.</p> <p><b>2.4</b> All Bidders must adhere to the UN Supplier Code of Conduct, which may be found at <a href="http://www.un.org/depts/ptd/pdf/conduct_english.pdf">http://www.un.org/depts/ptd/pdf/conduct_english.pdf</a></p>
<b>3. Eligibility</b>	<p><b>3.1</b> A vendor should not be suspended, debarred, or otherwise identified as ineligible by any UN Organization or the World Bank Group or any other international Organization. Vendors are therefore required to disclose to UNDP whether they are subject to any sanction or temporary suspension imposed by these organizations.</p> <p><b>3.2</b> It is the Bidder's responsibility to ensure that its employees, joint venture members, sub-contractors, service providers, suppliers and/or their employees meet the eligibility requirements as established by UNDP.</p>
<b>4. Conflict of Interests</b>	<p><b>4.1</b> Bidders must strictly avoid conflicts with other assignments or their own interests, and act without consideration for future work. Bidders found to have a conflict of interest shall be disqualified. Without limitation on the generality of the above, Bidders, and any of their affiliates, shall be considered to have a conflict of interest with one or more parties in this solicitation process, if they:</p>

	<ul style="list-style-type: none"> <li>a) Are or have been associated in the past, with a firm or any of its affiliates which have been engaged by UNDP to provide services for the preparation of the design, specifications, Terms of Reference, cost analysis/estimation, and other documents to be used for the procurement of the goods and services in this selection process;</li> <li>b) Were involved in the preparation and/or design of the programme/project related to the services requested under this RFP; or</li> <li>c) Are found to be in conflict for any other reason, as may be established by, or at the discretion of UNDP.</li> </ul> <p>4.2 In the event of any uncertainty in the interpretation of a potential conflict of interest, Bidders must disclose to UNDP, and seek UNDP's confirmation on whether or not such a conflict exists.</p> <p>4.3 Similarly, the Bidders must disclose in their proposal their knowledge of the following:</p> <ul style="list-style-type: none"> <li>a) If the owners, part-owners, officers, directors, controlling shareholders, of the bidding entity or key personnel are family members of UNDP staff involved in the procurement functions and/or the Government of the country or any Implementing Partner receiving services under this RFP; and</li> <li>b) All other circumstances that could potentially lead to actual or perceived conflict of interest, collusion or unfair competition practices.</li> </ul> <p>Failure to disclose such an information may result in the rejection of the proposal or proposals affected by the non-disclosure.</p> <p>4.4 The eligibility of Bidders that are wholly or partly owned by the Government shall be subject to UNDP's further evaluation and review of various factors such as being registered, operated and managed as an independent business entity, the extent of Government ownership/share, receipt of subsidies, mandate and access to information in relation to this RFP, among others. Conditions that may lead to undue advantage against other Bidders may result in the eventual rejection of the Proposal.</p>
<b>B. PREPARATION OF PROPOSALS</b>	
<b>5. General Considerations</b>	<p>5.1 In preparing the Proposal, the Bidder is expected to examine the RFP in detail. Material deficiencies in providing the information requested in the RFP may result in rejection of the Proposal.</p> <p>5.2 The Bidder will not be permitted to take advantage of any errors or omissions in the RFP. Should such errors or omissions be discovered, the Bidder must notify the UNDP</p>
<b>6. Cost of Preparation of Proposal</b>	<p>6.1 The Bidder shall bear any and all costs related to the preparation and/or submission of the Proposal, regardless of whether its Proposal was selected or not. UNDP shall not be responsible or liable for those costs, regardless of the conduct or outcome of the procurement process.</p>
<b>7. Language</b>	<p>7.1 The Proposal, as well as any and all related correspondence exchanged by the Bidder and UNDP, shall be written in the language (s) specified in the BDS.</p>
<b>8. Documents Comprising the Proposal</b>	<p>8.1 The Proposal shall comprise of the following documents:</p> <ul style="list-style-type: none"> <li>a) Documents Establishing the Eligibility and Qualifications of the Bidder;</li> <li>b) Technical Proposal;</li> <li>c) Financial Proposal;</li> <li>d) Any attachments and/or appendices to the Proposal.</li> </ul>
<b>9. Documents Establishing the</b>	<p>9.1 The Bidder shall furnish documentary evidence of its status as an eligible and qualified vendor, using the Forms provided under Section 6 and providing</p>

<i>Eligibility and Qualifications of the Bidder</i>	documents required in those forms. In order to award a contract to a Bidder, its qualifications must be documented to UNDP's satisfaction.
<i>10. Technical Proposal Format and Content</i>	<p>10.1 The Bidder is required to submit a Technical Proposal using the Standard Forms and templates provided in Section 6 of the RFP.</p> <p>10.2 The Technical Proposal shall not include any price or financial information. A Technical Proposal containing material financial information may be declared non-responsive.</p> <p>10.3 Samples of items, when required as per Section 5, shall be provided within the time specified and unless otherwise specified by UNDP, and at no expense to UNDP</p> <p>10.4 When applicable and required as per Section 5, the Bidder shall describe the necessary training programme available for the maintenance and operation of the services and/or equipment offered as well as the cost to the UNDP. Unless otherwise specified, such training as well as training materials shall be provided in the language of the Bid as specified in the BDS.</p>
<i>11. Financial Proposals</i>	<p>11.1 The Financial Proposal shall be prepared using the Standard Form provided in Section 6 of the RFP. It shall list all major cost components associated with the services, and the detailed breakdown of such costs.</p> <p>11.2 Any output and activities described in the Technical Proposal but not priced in the Financial Proposal, shall be assumed to be included in the prices of other activities or items, as well as in the final total price.</p> <p>11.3 Prices and other financial information must not be disclosed in any other place except in the financial proposal.</p>
<i>12. Proposal Security</i>	<p>12.1 A Proposal Security, if required by BDS, shall be provided in the amount and form indicated in the BDS. The Proposal Security shall be valid up to thirty (30) days after the final date of validity of the Proposal.</p> <p>12.2 The Proposal Security shall be included along with the Technical Proposal. If Proposal Security is required by the RFP but is not found along with the Technical Proposal, the Proposal shall be rejected.</p> <p>12.3 If the Proposal Security amount or its validity period is found to be less than what is required by UNDP, UNDP shall reject the Proposal.</p> <p>12.4 In the event an electronic submission is allowed in the BDS, Bidders shall include a copy of the Bid Security in their proposal and the original of the Proposal Security must be sent via courier or hand delivery as per the instructions in BDS.</p> <p>12.5 The Proposal Security may be forfeited by UNDP, and the Proposal rejected, in the event of any one or combination, of the following conditions:</p> <ol style="list-style-type: none"> <li>If the Bidder withdraws its offer during the period of the Proposal Validity specified in the BDS, or;</li> <li>In the event that the successful Bidder fails: <ol style="list-style-type: none"> <li>to sign the Contract after UNDP has issued an award; or</li> </ol> </li> </ol> <p>12.6 to furnish the Performance Security, insurances, or other documents that UNDP may require as a condition precedent to the effectivity of the contract that may be awarded to the Bidder.</p>
<i>13. Currencies</i>	<p>13.1 All prices shall be quoted in the currency or currencies indicated in the BDS. Where Proposals are quoted in different currencies, for the purposes of comparison of all Proposals:</p> <ol style="list-style-type: none"> <li>UNDP will convert the currency quoted in the Proposal into the UNDP preferred currency, in accordance with the prevailing UN operational rate of exchange on the last day of submission of Proposals; and</li> </ol>

	<p>b) In the event that UNDP selects a proposal for award that is quoted in a currency different from the preferred currency in the BDS, UNDP shall reserve the right to award the contract in the currency of UNDP's preference, using the conversion method specified above.</p>
<p><i>14. Joint Venture, Consortium or Association</i></p>	<p>14.1 If the Bidder is a group of legal entities that will form or have formed a Joint Venture (JV), Consortium or Association for the Proposal, they shall confirm in their Proposal that : (i) they have designated one party to act as a lead entity, duly vested with authority to legally bind the members of the JV, Consortium or Association jointly and severally, which shall be evidenced by a duly notarized Agreement among the legal entities, and submitted with the Proposal; and (ii) if they are awarded the contract, the contract shall be entered into, by and between UNDP and the designated lead entity, who shall be acting for and on behalf of all the member entities comprising the joint venture.</p> <p>14.2 After the Deadline for Submission of Proposal, the lead entity identified to represent the JV, Consortium or Association shall not be altered without the prior written consent of UNDP or the PMU.</p> <p>14.3 The lead entity and the member entities of the JV, Consortium or Association shall abide by the provisions of Clause 9 herein in respect of submitting only one proposal.</p> <p>14.4 The description of the organization of the JV, Consortium or Association must clearly define the expected role of each of the entity in the joint venture in delivering the requirements of the RFP, both in the Proposal and the JV, Consortium or Association Agreement. All entities that comprise the JV, Consortium or Association shall be subject to the eligibility and qualification assessment by UNDP.</p> <p>14.5 A JV, Consortium or Association in presenting its track record and experience should clearly differentiate between:</p> <ol style="list-style-type: none"> <li>Those that were undertaken together by the JV, Consortium or Association; and</li> <li>Those that were undertaken by the individual entities of the JV, Consortium or Association.</li> </ol> <p>14.6 Previous contracts completed by individual experts working privately but who are permanently or were temporarily associated with any of the member firms cannot be claimed as the experience of the JV, Consortium or Association or those of its members, but should only be claimed by the individual experts themselves in their presentation of their individual credentials.</p> <p>14.7 JV, Consortium or Associations are encouraged for high value, multi-sectoral requirements when the spectrum of expertise and resources required may not be available within one firm.</p>
<p><i>15. Only One Proposal</i></p>	<p>15.1 The Bidder (including the individual members of any Joint Venture) shall submit only one Proposal, either in its own name or as part of a Joint Venture.</p> <p>15.2 Proposals submitted by two (2) or more Bidders shall all be rejected if they are found to have any of the following:</p> <ol style="list-style-type: none"> <li>they have at least one controlling partner, director or shareholder in common; or</li> <li>any one of them receive or have received any direct or indirect subsidy from the other/s; or</li> <li>they have the same legal representative for purposes of this RFP; or</li> <li>they have a relationship with each other, directly or through common third parties, that puts them in a position to have access to information about, or influence on the Proposal of, another Bidder regarding this RFP process;</li> <li>they are subcontractors to each other's Proposal, or a subcontractor to one</li> </ol>



	<p>Proposal also submits another Proposal under its name as lead Bidder; or</p> <p>f) some key personnel proposed to be in the team of one Bidder participates in more than one Proposal received for this RFP process. This condition relating to the personnel, does not apply to subcontractors being included in more than one Proposal.</p>
<b>16. Proposal Validity Period</b>	<p>16.1 Proposals shall remain valid for the period specified in the BDS, commencing on the Deadline for Submission of Proposals. A Proposal valid for a shorter period may be rejected by UNDP and rendered non-responsive.</p> <p>16.2 During the Proposal validity period, the Bidder shall maintain its original Proposal without any change, including the availability of the Key Personnel, the proposed rates and the total price.</p>
<b>17. Extension of Proposal Validity Period</b>	<p>17.1 In exceptional circumstances, prior to the expiration of the proposal validity period, UNDP or the PMU may request Bidders to extend the period of validity of their Proposals. The request and the responses shall be made in writing, and shall be considered integral to the Proposal.</p> <p>17.2 If the Bidder agrees to extend the validity of its Proposal, it shall be done without any change in the original Proposal.</p> <p>17.3 The Bidder has the right to refuse to extend the validity of its Proposal, and in which case, such Proposal will not be further evaluated.</p>
<b>18. Clarification of Proposal</b>	<p><b>18.1</b> Bidders may request clarifications on any of the RFP documents no later than the date indicated in the BDS. Any request for clarification must be sent in writing in the manner indicated in the BDS. If inquiries are sent other than specified channel, even if they are sent to a UNDP staff member, UNDP shall have no obligation to respond or confirm that the query was officially received.</p> <p><b>18.2</b> UNDP or the PMU will provide the responses to clarifications through the method specified in the BDS.</p> <p>18.3 UNDP and the PMU shall endeavor to provide responses to clarifications in an expeditious manner, but any delay in such response shall not cause an obligation on the part of UNDP to extend the submission date of the Proposals, unless UNDP deems that such an extension is justified and necessary.</p>
<b>19. Amendment of Proposals</b>	<p>19.1 At any time prior to the deadline of Proposal submission, UNDP may for any reason, such as in response to a clarification requested by a Bidder, modify the RFP in the form of an amendment to the RFP. Amendments will be made available to all prospective bidders.</p> <p>19.2 If the amendment is substantial, UNDP may extend the Deadline for submission of proposal to give the Bidders reasonable time to incorporate the amendment into their Proposals.</p>
<b>20. Alternative Proposals</b>	<p>20.1 Unless otherwise specified in the BDS, alternative proposals shall not be considered. If submission of alternative proposal is allowed by BDS, a Bidder may submit an alternative proposal, but only if it also submits a proposal conforming to the RFP requirements. UNDP shall only consider the alternative proposal offered by the Bidder whose conforming proposal ranked the highest as per the specified evaluation method. Where the conditions for its acceptance are met, or justifications are clearly established, UNDP reserves the right to award a contract based on an alternative proposal.</p> <p>20.2 If multiple/alternative proposals are being submitted, they must be clearly marked as "Main Proposal" and "Alternative Proposal"</p>
<b>21. Pre-Bid Conference</b>	<p>21.1 When appropriate, a Bidder's conference will be conducted at the date, time</p>

	<p>and location specified in the BDS. All Bidders are encouraged to attend. Non-attendance, however, shall not result in disqualification of an interested Bidder. Minutes of the Bidder's conference will be disseminated on the procurement website and shared by email or on the e-Tendering platform as specified in the BDS. No verbal statement made during the conference shall modify the terms and conditions of the RFP, unless specifically incorporated in the Minutes of the Bidder's Conference or issued/posted as an amendment to RFP.</p>
<b>C. SUBMISSION AND OPENING OF PROPOSALS</b>	
<b>22. Submission</b>	<p>22.1 The Bidder shall submit a duly signed and complete Proposal comprising the documents and forms in accordance with the requirements in the BDS. The submission shall be in the manner specified in the BDS.</p> <p>22.2 The Proposal shall be signed by the Bidder or person(s) duly authorized to commit the Bidder. The authorization shall be communicated through a document evidencing such authorization issued by the legal representative of the bidding entity, or a Power of Attorney, accompanying the Proposal.</p> <p>22.3 Bidders must be aware that the mere act of submission of a Proposal, in and of itself, implies that the Bidder fully accepts the UNDP General Contract Terms and Conditions.</p>
<b>Hard copy (manual) submission</b>	<p>22.4 Hard copy (manual) submission by courier or hand delivery allowed or specified in the BDS shall be governed as follows:</p> <ul style="list-style-type: none"> <li>a) The signed Proposal shall be marked "Original", and its copies marked "Copy" as appropriate. The number of copies is indicated in the BDS. All copies shall be made from the signed original only. If there are discrepancies between the original and the copies, the original shall prevail.</li> <li>b) The Technical Proposal and the Financial Proposal envelopes MUST BE COMPLETELY SEPARATE and each of them must be submitted sealed individually and clearly marked on the outside as either "TECHNICAL PROPOSAL" or "FINANCIAL PROPOSAL", as appropriate. Each envelope SHALL clearly indicate the name of the Bidder. The outer envelopes shall: <ul style="list-style-type: none"> <li>i. Bear the name and address of the bidder;</li> <li>ii. Be addressed to UNDP as specified in the BDS</li> </ul> </li> <li>iii. Bear a warning that states "<i>Not to be opened before the time and date for proposal opening</i>" as specified in the BDS.</li> </ul> <p>If the envelopes and packages with the Proposal are not sealed and marked as required, UNDP shall assume no responsibility for the misplacement, loss, or premature opening of the Proposal.</p>
<b>Email Submission</b>	<p>22.5 Email submission, if allowed or specified in the BDS, shall be governed as follows:</p> <ul style="list-style-type: none"> <li>a) Electronic files that form part of the proposal must be in accordance with the format and requirements indicated in BDS;</li> <li>b) The Technical Proposal and the Financial Proposal files MUST BE COMPLETELY SEPARATE. The financial proposal shall be encrypted with different passwords and clearly labelled. The files must be sent to the dedicated email address specified in the BDS.</li> <li>c) The password for opening the Financial Proposal should be provided only upon request of UNDP. UNDP will request password only from bidders whose Technical Proposal has been found to be technically responsive. Failure to provide correct password may result in the proposal being rejected.</li> </ul>

<b>eTendering submission</b>	<p>22.6 Electronic submission through eTendering, if allowed or specified in the BDS, shall be governed as follows:</p> <ul style="list-style-type: none"> <li>a) Electronic files that form part of the proposal must be in accordance with the format and requirements indicated in BDS;</li> <li>b) The Technical Proposal and the Financial Proposal files MUST BE COMPLETELY SEPARATE and each of them must be uploaded individually and clearly labelled.</li> <li>d) The Financial Proposal file must be encrypted with a password so that it cannot be opened nor viewed until the password is provided. The password for opening the Financial Proposal should be provided only upon request of UNDP. UNDP will request password only from bidders whose technical proposal has been found to be technically responsive. Failure to provide the correct password may result in the proposal being rejected.</li> <li>c) Documents which are required to be in original form (e.g. Bid Security, etc.) must be sent via courier or hand delivery as per the instructions in BDS.</li> <li>d) Detailed instructions on how to submit, modify or cancel a bid in the eTendering system are provided in the eTendering system Bidder User Guide and Instructional videos available on this link: <a href="http://www.undp.org/content/undp/en/home/operations/procurement/business/procurement-notices/resources/">http://www.undp.org/content/undp/en/home/operations/procurement/business/procurement-notices/resources/</a></li> </ul>
<b>23. Deadline for Submission of Proposals and Late Proposals</b>	<p>23.1 Complete Proposals must be received by PMU in the manner, and no later than the date and time, specified in the BDS. UNDP shall only recognize the date and time that the bid was received by UNDP</p> <p>23.2 UNDP shall not consider any Proposal that is submitted after the deadline for the submission of Proposals.</p>
<b>24. Withdrawal, Substitution, and Modification of Proposals</b>	<p>24.1 A Bidder may withdraw, substitute or modify its Proposal after it has been submitted at any time prior to the deadline for submission.</p> <p>24.2 Manual and Email submissions: A bidder may withdraw, substitute or modify its Proposal by sending a written notice to UNDP, duly signed by an authorized representative, and shall include a copy of the authorization (or a Power of Attorney). The corresponding substitution or modification of the Proposal, if any, must accompany the respective written notice. All notices must be submitted in the same manner as specified for submission of proposals, by clearly marking them as "WITHDRAWAL" "SUBSTITUTION," or "MODIFICATION"</p> <p>24.3 eTendering: A Bidder may withdraw, substitute or modify its Proposal by Canceling, Editing, and re-submitting the proposal directly in the system. It is the responsibility of the Bidder to properly follow the system instructions, duly edit and submit a substitution or modification of the Proposal as needed. Detailed instructions on how to cancel or modify a Proposal directly in the system are provided in Bidder User Guide and Instructional videos.</p> <p>24.4 Proposals requested to be withdrawn shall be returned unopened to the Bidders (only for manual submissions), except if the bid is withdrawn after the bid has been opened</p>
<b>25. Proposal Opening</b>	<p>25.1 There is no public bid opening for RFPs. UNDP and the PMU shall open the Proposals in the presence of an ad-hoc committee formed by UNDP, consisting of at least two (2) members. In the case of e-Tendering submission, bidders will receive an automatic notification once their proposal is opened.</p>
<b>D. EVALUATION OF PROPOSALS</b>	
<b>26. Confidentiality</b>	<p>26.1 Information relating to the examination, evaluation, and comparison of Proposals, and the recommendation of contract award, shall not be disclosed</p>

	<p>to Bidders or any other persons not officially concerned with such process, even after publication of the contract award.</p> <p>26.2 Any effort by a Bidder or anyone on behalf of the Bidder to influence UNDP in the examination, evaluation and comparison of the Proposals or contract award decisions may, at UNDP's decision, result in the rejection of its Proposal and may be subject to the application of prevailing UNDP's vendor sanctions procedures.</p>
<i>27. Evaluation of Proposals</i>	<p>27.1 The Bidder is not permitted to alter or modify its Proposal in any way after the proposal submission deadline except as permitted under Clause 24 of this RFP. UNDP and the PMU will conduct the evaluation solely on the basis of the submitted Technical and Financial Proposals.</p> <p>27.2 Evaluation of proposals is made of the following steps:</p> <ol style="list-style-type: none"> <li>Preliminary Examination</li> <li>Minimum Eligibility and Qualification (if pre-qualification is not done)</li> <li>Evaluation of Technical Proposals</li> <li>Evaluation of Financial Proposals</li> </ol>
<i>28. Preliminary Examination</i>	<p>28.1 UNDP and PMU shall examine the Proposals to determine whether they are complete with respect to minimum documentary requirements, whether the documents have been properly signed, and whether the Proposals are generally in order, among other indicators that may be used at this stage. UNDP reserves the right to reject any Proposal at this stage.</p>
<i>29. Evaluation of Eligibility and Qualification</i>	<p>29.1 Eligibility and Qualification of the Bidder will be evaluated against the Minimum Eligibility/Qualification requirements specified in the Section 4 (Evaluation Criteria).</p> <p>29.2 In general terms, vendors that meet the following criteria may be considered qualified:</p> <ol style="list-style-type: none"> <li>They are not included in the UN Security Council 1267/1989 Committee's list of terrorists and terrorist financiers, and in UNDP's ineligible vendors' list;</li> <li>They have a good financial standing and have access to adequate financial resources to perform the contract and all existing commercial commitments,</li> <li>They have the necessary similar experience, technical expertise, production capacity where applicable, quality certifications, quality assurance procedures and other resources applicable to the provision of the services required;</li> <li>They are able to comply fully with UNDP General Terms and Conditions of Contract;</li> <li>They do not have a consistent history of court/arbitral award decisions against the Bidder; and</li> <li>They have a record of timely and satisfactory performance with their clients.</li> </ol>
<i>30. Evaluation of Technical and Financial Proposals</i>	<p>30.1 The evaluation team shall review and evaluate the Technical Proposals on the basis of their responsiveness to the Terms of Reference and other RFP documents, applying the evaluation criteria, sub-criteria, and point system specified in the Section 4 (Evaluation Criteria). A Proposal shall be rendered non-responsive at the technical evaluation stage if it fails to achieve the minimum technical score indicated in the BDS. When necessary and if stated in the BDS, UNDP may invite technically responsive bidders for a presentation related to their technical proposals. The conditions for the presentation shall be provided in the bid document where required.</p>

	<p>30.2 In the second stage, only the Financial Proposals of those Bidders who achieve the minimum technical score will be opened for evaluation. The Financial Proposals corresponding to Technical Proposals that were rendered non-responsive shall remain unopened, and, in the case of manual submission, be returned to the Bidder unopened. For emailed Proposals and e-tendering submissions, UNDP will not request for the password of the Financial Proposals of bidders whose Technical Proposal were found not responsive.</p> <p>30.3 The evaluation method that applies for this RFP shall be as indicated in the BDS, which may be either of two (2) possible methods, as follows: (a) the lowest priced method which selects the lowest evaluated financial proposal of the technically responsive Bidders; or (b) the combined scoring method which will be based on a combination of the technical and financial score.</p> <p>30.4 When the BDS specifies a combined scoring method, the formula for the rating of the Proposals will be as follows:</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p><u>Rating the Technical Proposal (TP):</u></p> <p><b>TP Rating</b> = (Total Score Obtained by the Offer / Max. Obtainable Score for TP) x 100</p> <p><u>Rating the Financial Proposal (FP):</u></p> <p><b>FP Rating</b> = (Lowest Priced Offer / Price of the Offer Being Reviewed) x 100</p> <p><u>Total Combined Score:</u></p> <p><b>Combined Score</b> = (TP Rating) x (Weight of TP, e.g. 70%) + (FP Rating) x (Weight of FP, e.g., 30%)</p> </div>
31. Due Diligence	<p>31.1 UNDP reserves the right to undertake a due diligence exercise, also called post qualification, aimed at determining to its satisfaction, the validity of the information provided by the Bidder. Such exercise shall be fully documented and may include, but need not be limited to, all or any combination of the following:</p> <ul style="list-style-type: none"> <li>a) Verification of accuracy, correctness and authenticity of information provided by the Bidder;</li> <li>b) Validation of extent of compliance to the RFP requirements and evaluation criteria based on what has so far been found by the evaluation team;</li> <li>c) Inquiry and reference checking with Government entities with jurisdiction on the Bidder, or with previous clients, or any other entity that may have done business with the Bidder;</li> <li>d) Inquiry and reference checking with previous clients on the performance on on-going or contracts completed, including physical inspections of previous works, as necessary;</li> <li>e) Physical inspection of the Bidder's offices, branches or other places where business transpires, with or without notice to the Bidder;</li> <li>f) Other means that UNDP may deem appropriate, at any stage within the selection process, prior to awarding the contract.</li> </ul>
32. Clarification of Proposals	<p>32.1 To assist in the examination, evaluation and comparison of Proposals, UNDP and/or the PMU may, at its discretion, ask any Bidder for a clarification of its Proposal.</p> <p>32.2 UNDP's request for clarification and the response shall be in writing and no change in the prices or substance of the Proposal shall be sought, offered, or permitted, except to provide clarification, and confirm the correction of any</p>

	<p>arithmetic errors discovered by UNDP in the evaluation of the Proposals, in accordance with RFP.</p> <p>32.3 Any unsolicited clarification submitted by a Bidder in respect to its Proposal, which is not a response to a request by UNDP, shall not be considered during the review and evaluation of the Proposals.</p>
<b>33. Responsiveness of Proposal</b>	<p>33.1 UNDP's determination of a Proposal's responsiveness will be based on the contents of the Proposal itself. A substantially responsive Proposal is one that conforms to all the terms, conditions, TOR and other requirements of the RFP without material deviation, reservation, or omission.</p> <p>33.2 If a Proposal is not substantially responsive, it shall be rejected by UNDP and may not subsequently be made responsive by the Bidder by correction of the material deviation, reservation, or omission.</p>
<b>34. Nonconformities, Repairable Errors and Omissions</b>	<p>34.1 Provided that a Proposal is substantially responsive, UNDP or the PMU may waive any non-conformities or omissions in the Proposal that, in the opinion of UNDP, do not constitute a material deviation.</p> <p>34.2 UNDP or the PMU may request the Bidder to submit the necessary information or documentation, within a reasonable period of time, to rectify nonmaterial nonconformities or omissions in the Proposal related to documentation requirements. Such omission shall not be related to any aspect of the price of the Proposal. Failure of the Bidder to comply with the request may result in the rejection of its Proposal.</p> <p>34.3 For Financial Proposal that has been opened, UNDP and the PMU shall check and correct arithmetical errors as follows:</p> <ul style="list-style-type: none"> <li>a) if there is a discrepancy between the unit price and the line item total that is obtained by multiplying the unit price by the quantity, the unit price shall prevail and the line item total shall be corrected, unless in the opinion of UNDP there is an obvious misplacement of the decimal point in the unit price; in which case the line item total as quoted shall govern and the unit price shall be corrected;</li> <li>b) if there is an error in a total corresponding to the addition or subtraction of subtotals, the subtotals shall prevail and the total shall be corrected; and</li> <li>c) if there is a discrepancy between words and figures, the amount in words shall prevail, unless the amount expressed in words is related to an arithmetic error, in which case the amount in figures shall prevail.</li> </ul> <p>34.4 If the Bidder does not accept the correction of errors made by UNDP, its Proposal shall be rejected.</p>
<b>B. AWARD OF CONTRACT</b>	
<b>35. Right to Accept, Reject, Any or All Proposals</b>	<p>35.1 UNDP and/or the PMU reserves the right to accept or reject any Proposal, to render any or all of the Proposals as non-responsive, and to reject all Proposals at any time prior to award of contract, without incurring any liability, or obligation to inform the affected Bidder(s) of the grounds for UNDP's action. UNDP shall not be obliged to award the contract to the lowest priced offer.</p>
<b>36. Award Criteria</b>	<p>36.1 Prior to expiration of the proposal validity, UNDP shall award the contract to the qualified Bidder based on the award criteria indicated in the BDS.</p>
<b>37. Debriefing</b>	<p>37.1 In the event that a Bidder is unsuccessful, the Bidder may request a debriefing from UNDP. The purpose of the debriefing is to discuss the strengths and weaknesses of the Bidder's submission, in order to assist the Bidder in improving its future proposals for UNDP procurement opportunities. The content of other proposals and how they compare to the Bidder's submission</p>

	shall not be discussed.
<b>38. Right to Vary Requirements at the Time of Award</b>	38.1 At the time of award of Contract, UNDP reserves the right to vary 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.
<b>39. Contract Signature</b>	39.1 Within fifteen (15) days from the date of receipt of the Contract, the successful Bidder shall sign and date the Contract and return it to UNDP. Failure to do so may constitute sufficient grounds for the annulment of the award, and forfeiture of the Proposal Security, if any, and on which event, UNDP may award the Contract to the Second Ranked Bidder or call for new Proposals.
<b>40. Contract Type and General Terms and Conditions</b>	40.1 The types of Contract to be signed and the applicable UNDP Contract General Terms and Conditions, as specified in BDS, can be accessed at <a href="http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html">http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html</a>
<b>41. Performance Security</b>	41.1 40.1 A performance security, if required in BDS, shall be provided in the amount specified in BDS and form available at <a href="https://popp.undp.org/_layouts/15/WopiFrame.aspx?sourcedoc=/UNDP_POPP_DOCUMENT_LIBRARY/Public/PSU_Solicitation_Performance%20Guarantee%20Form.docx&amp;action=default">https://popp.undp.org/_layouts/15/WopiFrame.aspx?sourcedoc=/UNDP_POPP_DOCUMENT_LIBRARY/Public/PSU_Solicitation_Performance%20Guarantee%20Form.docx&amp;action=default</a> within fifteen (15) days of the contract signature by both parties. Where a performance security is required, the receipt of the performance security by UNDP shall be a condition for rendering the contract effective.
<b>42. Bank Guarantee for Advanced Payment</b>	42.1 Except when the interests of UNDP so require, it is UNDP's preference to make no advance payment(s) (i.e., payments without having received any outputs). If an advance payment is allowed as per BDS, and exceeds 20% of the total contract price, or USD 30,000, whichever is less, the Bidder shall submit a Bank Guarantee in the full amount of the advance payment in the form available at <a href="https://popp.undp.org/_layouts/15/WopiFrame.aspx?sourcedoc=/UNDP_POPP_DOCUMENT_LIBRARY/Public/PSU_Contract%20Management%20Payment%20and%20Taxes_Advanced%20Payment%20Guarantee%20Form.docx&amp;action=default">https://popp.undp.org/_layouts/15/WopiFrame.aspx?sourcedoc=/UNDP_POPP_DOCUMENT_LIBRARY/Public/PSU_Contract%20Management%20Payment%20and%20Taxes_Advanced%20Payment%20Guarantee%20Form.docx&amp;action=default</a>
<b>43. Liquidated Damages</b>	43.1 If specified in BDS, UNDP shall apply Liquidated Damages resulting from the Contractor's delays or breach of its obligations as per the Contract.
<b>44. Payment Provisions</b>	44.1 Payment will be made only upon UNDP's acceptance of the work performed. The terms of payment shall be within thirty (30) days, after receipt of invoice and certification of acceptance of work issued by the proper authority in UNDP with direct supervision of the Contractor. Payment will be effected by bank transfer in the currency of contract.
<b>45. Vendor Protest</b>	45.1 UNDP's vendor protest procedure provides an opportunity for appeal to those persons or firms not awarded a contract through a competitive procurement process. In the event that a Bidder believes that it was not treated fairly, the following link provides further details regarding UNDP vendor protest procedures: <a href="http://www.undp.org/content/undp/en/home/operations/procurement/business/protest-and-sanctions.html">http://www.undp.org/content/undp/en/home/operations/procurement/business/protest-and-sanctions.html</a>
<b>46. Other Provisions</b>	46.1 In the event that the Bidder offers a lower price to the host Government (e.g.



	<p>General Services Administration (GSA) of the federal government of the United States of America) for similar services, UNDP shall be entitled to same lower price. The UNDP General Terms and Conditions shall have precedence.</p> <p>46.2 UNDP is entitled to receive the same pricing offered by the same Contractor in contracts with the United Nations and/or its Agencies. The UNDP General Terms and Conditions shall have precedence.</p> <p>46.3 The United Nations has established restrictions on employment of (former) UN staff who have been involved in the procurement process as per bulletin ST/SGB/2006/15  <a href="http://www.un.org/en/ga/search/view_doc.asp?symbol=ST/SGB/2006/15&amp;referer">http://www.un.org/en/ga/search/view_doc.asp?symbol=ST/SGB/2006/15&amp;referer</a></p>
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### 3. SECTION 3. BID DATA SHEET

The following data for the services to be procured shall complement, supplement, or amend the provisions in the Request for Proposals. In the case of a conflict between the Instructions to Bidders, the Data Sheet, and other annexes or references attached to the Data Sheet, the provisions in the Data Sheet shall prevail.

BDS No.	Ref. to Section.2	Data	Specific Instructions / Requirements
1	7	Language of the Proposal	English
2		Submitting Proposals for Parts or sub-parts of the TOR (partial bids)	Not Allowed
3	20	Alternative Proposals	Shall not be considered
4	21	Pre-proposal conference	Will be Conducted Time: 10:00 am Cairo local time. Date: 21/07/2019 Venue: Shore Protection Authority - Conference Room - First Floor. El-ismaillia Canal mouth – Shoubra Elkhema. The focal point for the arrangement is: UNDP Telephone: +202 25780302 E-mail: procurementnotice.egypt@undp.org
5	10	Proposal Validity Period	90 days
6	14	Bid Security	Not Required
7	41	Advanced Payment upon signing of contract	Not Allowed
8	42	Liquidated Damages	Will be imposed as follows: Percentage of contract price per day of delay: 0.1 Max. number of days of delay 60, after which UNDP may terminate the contract.
9	40	Performance Security	Not Required
10	18	Currency of Proposal	United States Dollar

11	31	Deadline for submitting requests for clarifications/ questions	15 days before the submission deadline
12	31	Contact Details for submitting clarifications/ questions	Focal Person: UNDP Address: United Nations Development Programme World Trade Center, 1191 Corniche El Nil Boulac, Cairo, Egypt – 8th floor – Procurement Unit E-mail address: Procurementnotice.egypt@undp.org
13	18, 19 and 21	Manner of Disseminating Supplemental Information to the RFP and responses/clarifications to queries	<div>Direct communication to prospective Proposers by email</div> E-mail address: Procurementnotice.egypt@undp.org
14	23	Deadline for Submission	18 August 2019 - 14:00 pm Cairo local time
14	22	Allowable Manner of Submitting Proposals	<input checked="" type="checkbox"/> Courier/Hand Delivery <input type="checkbox"/> Submission by email <input type="checkbox"/> e-Tendering
15	22	Proposal Submission Address	<u>United Nations Development Programme</u> <u>World Trade Center, 1191 Corniche El Nil</u> <u>Boulac, Cairo, Egypt – 8th floor – Procurement Unit</u>
16	22	Electronic submission (email or eTendering) requirements	Not applicable
17	27 36	Evaluation Method for the Award of Contract	Combined Scoring Method, using the 70%-30% distribution for technical and financial proposals respectively  The minimum technical score required to pass is 70%.
18		Expected date for commencement of Contract	<div>01/05/20</div>
19		Maximum expected duration of contract	2-3 years
20	35	UNDP will award the contract to:	<div>One Proposer Only</div>
21	39	Type of Contract	<div>Consultancy Services</div>
22	39	UNDP Contract Terms and Conditions that will apply	<div>UNDP General Terms and Conditions for Professional Services</div>
23		Other Information Re-	An original copy of the technical proposal should be provided with

		lated to the RFP	3 additional copies in a separate envelope. One original copy of the financial proposal should be delivered in a closed envelope. Bidders are encouraged to deliver an electronic copy of the technical proposal.
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## 4. SECTION 4. EVALUATION CRITERIA

### Preliminary Examination Criteria

Proposals will be examined to determine whether they are complete and submitted in accordance with RFP requirements as per below criteria on a Yes/No basis:

- Appropriate signatures
- Power of Attorney
- Minimum documents provided
- Technical and Financial Proposals submitted separately
- Bid Validity

### Minimum Eligibility and Qualification Criteria

Eligibility and Qualification will be evaluated on Pass/Fail basis.

If the Proposal is submitted as a Joint Venture/Consortium/Association, each member should meet minimum criteria, unless otherwise specified in the criterion.

Subject	Criteria	Document Submission requirement
<b>ELIGIBILITY</b>		
<b>Legal Status</b>	Vendor is a legally registered entity.	Form B: Bidder Information Form
<b>Eligibility</b>	Vendor is not suspended, nor debarred, nor otherwise identified as ineligible by any UN Organization or the World Bank Group or any other international Organization in accordance with ITB clause 3.	Form A: Technical Proposal Submission Form
<b>Conflict of Interest</b>	No conflicts of interest in accordance with ITB clause 4.	Form A: Technical Proposal Submission Form
<b>Bankruptcy</b>	Not declared bankruptcy, not involved in bankruptcy or receivership proceedings, and there is no judgment or pending legal action against the vendor that could impair its operations in the foreseeable future.	Form A: Technical Proposal Submission Form
<b>QUALIFICATION</b>		
<b>History of Non-Performing Contracts<sup>1</sup></b>	Non-performance of a contract did not occur as a result of contractor default for the last 3 years.	Form D: Qualification Form
<b>Litigation History</b>	No consistent history of court/arbitral award decisions against the Bidder for the last 3 years.	Form D: Qualification Form
<b>Previous Experience</b>	Minimum 15 years of relevant experience.	Form D: Qualification Form
	Minimum 2 contracts of similar value, nature and complexity implemented over the last 10 years. <i>(For JV/Consortium/Association, all Parties cumulatively should</i>	Form D: Qualification Form

<sup>1</sup> Non-performance, as decided by UNDP, shall include all contracts where (a) non-performance was not challenged by the contractor, including through referral to the dispute resolution mechanism under the respective contract, and (b) contracts that were so challenged but fully settled against the contractor. Non-performance shall not include contracts where Employers decision was overruled by the dispute resolution mechanism. Non-performance must be based on all information on fully settled disputes or litigation, i.e. dispute or litigation that has been resolved in accordance with the dispute resolution mechanism under the respective contract and where all appeal instances available to the Bidder have been exhausted.

	<i>meet requirement).</i>	
<b>Financial Standing</b>	Presentation of the annual turnover for the last 3 years. <i>(For JV/Consortium/Association, all Parties cumulatively should meet requirement).</i>	Form D: Qualification Form
	Bidder must demonstrate the current soundness of its financial standing and indicate its prospective long-term profitability. <i>(For JV/Consortium/Association, all Parties cumulatively should meet requirement).</i>	Form D: Qualification Form

## Technical Evaluation Criteria

Summary of Technical Proposal Evaluation Forms		Points Obtainable
1.	Bidder's qualification, capacity and experience	300
2.	Proposed Methodology, Approach and Implementation Plan	400
3.	Management Structure and Key Personnel	300
	<b>Total</b>	<b>1000</b>

Section 1. Bidder's qualification, capacity and experience		Points obtainable
1.1	Reputation of Organization and Staff Credibility / Reliability / Industry Standing	50
1.2	General Organizational Capability which is likely to affect implementation: management structure, financial stability and project financing capacity, project management controls, extent to which any work would be subcontracted	90
1.3	Relevance of specialized knowledge and experience on similar engagements done globally and in the region/country	70
1.4	Quality assurance procedures and risk mitigation measures	
1.5	Organizational Commitment to Sustainability (mandatory weight) -Organization is compliant with ISO 14001 or ISO 14064 or equivalent – 20 points -Organization is a member of the UN Global Compact -5 points -Organization demonstrates significant commitment to sustainability through some other means- 5 points, for example internal company policy documents on women empowerment, renewable energies or membership of trade institutions promoting such issues	30
<b>Total Section 1</b>		<b>300</b>

Section 2. Proposed Methodology, Approach and Implementation Plan		Points obtainable
2.1	Understanding of the requirement: Have the important aspects of the task been addressed in sufficient detail? Are the different components of the project adequately weighted relative to one another?	90
2.2	Description of the Offeror's approach and methodology for meeting or exceeding the requirements of the Terms of Reference	110
2.3	The numerical models that will be used within the study	60
2.4	Description of available performance monitoring and evaluation mechanisms and tools; how they shall be adopted and used for a specific requirement	60
2.5	Assessment of the implementation plan proposed including whether the activities are properly sequenced and if these are logical and realistic	80
<b>Total Section 2</b>		<b>400</b>

Section 3. Management Structure and Key Personnel			Points obtainable
3.1	Composition and structure of the team proposed. Are the proposed roles of the management and the team of key personnel suitable for the provision of the necessary services?		30
3.2	Qualifications of key personnel proposed		
3.2 a	Team Leader		60
	- General Experience	15	
	- Specific Experience relevant to the assignment	25	
	- Regional/International experience	15	
	- Language Qualifications	5	
3.2 b	Other Key Experts		210
	- General Experience	45	
	- Specific Experience relevant to the assignment	90	
	- Regional/International experience	45	
	- Language Qualifications	30	
Total Section 3			300

## 5. SECTION 5. TERMS OF REFERENCE

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### **Development and Implementation of a climate resilient ICZM plan for the North Coast of Egypt**

#### **BACKGROUND:**

The Enhancing Climate Change Adaptation in the North Coast and Nile Delta Regions in Egypt Project (ECCADP) aims at supporting the adaptation efforts of Egypt in the North coast and in particular the Nile Delta which is identified by the Intergovernmental Panel on Climate Change (IPCC) in its Fourth Assessment Report as one of the world's three "extremely" vulnerable deltas in the world.

The objective of the ECCADP is to reduce coastal flooding risks in Egypt's North Coast due to the combination of projected sea level rise and more frequent and intense extreme storm events. Output 1 focuses on constructing 69 km of sand dune dikes at five vulnerable hotspots within the Nile Delta that were identified during an engineering scoping assessment and technical feasibility study. Output 2 focuses on the development of a climate resilient Integrated Coastal Zone Management (ICZM) plan for the entire North Coast of Egypt, to manage long-term risks including climate change.

The ECCADP will facilitate transformational change in the short-term by reducing coastal flooding threats along vulnerable hotspots in the Delta and in the long-term by integrating additional risks of climate change into coastal management and planning, budgeting and implementation of risk reduction measures. The ECCADP is implemented by the Ministry of Water Resources and Irrigation (MWRI) and is jointly funded by the Government of Egypt (GoE), the Green Climate Fund (GCF) and the United Nations Development Programme (UNDP).

The ECCADP seeks within its component no. 2 to recruit a competent consultant to Develop and assist the Implementation of a climate resilient ICZM plan for the North Coast of Egypt. The nominated consultant will build on the various outputs of the ICZM scoping study (<http://iczmegyptmaps.ihcantabria.com/Visor>) that was undertaken within the GEF/UNDP funded project, Adaptation to Climate Change in the Nile Delta through ICZM (ACCADP) which was completed in June 2018. These outputs include, but not limited to, the following:

- Compilation, analysis and integration of existing information of the North Coastal zone in Egypt to Identify physical, ecological and socioeconomic aspects, key issues and management priorities.
- Awareness raising material to coastal stakeholders, including, governmental authorities, public agencies, private sector, NGOs, society, etc.
- Assessment of the legal and institutional frameworks that govern the coastal zone in the North Coast in Egypt.

#### **OBJECTIVES:**

The overall objective of this assignment is to develop a climate resilient ICZM plan for the north Egyptian coastal zone. The assignment will raise the adaptive capacity of planning and implementing organizations in Egypt, rendering them more equipped to proactively address sea level rise and extreme weather events vulnerability and propose, design and implement integrated solutions that enjoy broad support of relevant stakeholders. The Specific objectives of the study include the following:



**Providing all the instruments required for gathering the information on which ICZM is built.**

This objective includes: Systems for coastal and ocean observation (in situ and remote sensing), systems for data retrieval and data analysis, numerical model systems for short-term forecasts and long-term trends in oceanic conditions and coastal impacts, integrated assessments tools for identifying and comparing alternatives.

**Providing the required knowledge of coastal vulnerability and risks.**

This objective includes: Identification of coastal vulnerabilities and assessment of how risks evolve with time under climate change, for different coastal regions and for different scenarios (climate and socio-economic).

**Providing the required know-how through capacity building.**

This objective includes: Transfer of knowledge and training how to use, maintain and improve observation systems, data analysis systems, numerical simulation and forecasting models. Training on methods for integrated risk assessment and on strategies to promote participation and cooperation in ICZM.

**Providing a framework for integrated decision-making.**

This objective includes the development of coastal planning procedures adapted to the Egyptian governance context, considering legal and organizational aspects of coastal adaptation, awareness raising and stakeholder participation in planning and decision making.

**Providing action plans for alleviating coastal, environmental, economic and social risks.**

This objective includes, but not limited to, the development of actions plans for alleviating potential coastal, environmental, economic and social risks. For example, Shoreline Management Plans need to be developed outlining best practices (planning measures, hard and soft measures, working-with-nature) for protecting vulnerable areas (including all types of land use and infrastructure) following an adaptive step wise approach against flood risks and also addressing other coastal risks that may result from climate change in conjunction with socio-economic developments, in particular the risk of increased soil salinization in the coastal zone. Similar plans need to be developed for other potential risks.

## **SCOPE OF WORK AND DELIVERABLES:**

The study will provide a detailed climate resilient plan for the entire North Coast of Egypt through Integrated Coastal Zone Management (ICZM) approach, together with the required underlying institutional and regulatory frameworks and information systems for implementation. The plan will also integrate adaptation measures against the various potential sea-level rise impacts into the national coastal zone development plan. To meet this objective an associated ocean and coastal observation system will be established to monitor trends in oceanic and coastal conditions under a changing climate as well as the impact of the different shore protection scenarios on the coastal erosion and shoreline stability.

It is anticipated that the above can be achieved through the following tasks each with associated specific deliverables:

## **STUDY INCEPTION REPORT**

The first 3-6 months of the study will be dedicated to preparatory activities. During this period the Consultant will familiarize with the study, prepare a clear and realistic workplan and make all necessary arrangements for its implementation. The inception phase will include a literature review and analysis of all past and current initiatives related to the development and management of the Mediterranean coast of Egypt. All existing information needed for carrying out the study shall be gathered: data, models, reports, plans, policies and institutional and legal arrangements pertaining to the physical, environmental, urban, social and economic status and functioning of the coastal zone, including coastal erosion and risks related to coastal hazards. An integral part of the inception phase will be the ICZM scoping study undertaken as part of the GEF/UNDP ACCNDP.

This information will be organized and analyzed in order to conduct a preliminary review of the major

coastal issues that require action in the short term and at the long term. The assessment of long-term issues will be based on a set of scenarios (projected changes) for external conditions that may have a major impact on the coastal zone; these external conditions include climate change impacts (sea level, wave climate, temperature, shortage of fresh water, ...), demographic, socio-economic and urban development that are deemed relevant. The data and information gathered during the whole study will be stored and graphically displayed in a GIS system to be chosen at the start of the inception phase.

**It is anticipated that the Consultant will:**

1. Collect and analyze all available materials that are relevant to the study;
2. Establish an office in Cairo;
3. Mobilize the study Team, including non-key experts;
4. Identify all major stakeholder organizations and key representatives (including, but not limited to, The Egyptian Environmental Affairs Agency (EEAA), The General Organization of Physical Planning (GOPP), New Urban communities Organization (NUC) and Tourism Development Agency (TDA));
5. Perform a thorough assessment of these Terms of Reference vis a vis the actual situation at the commencement of study implementation, and suggest any necessary amendments;
6. Establish whether the anticipated study inputs are realistic and are sufficient to produce expected outputs and achieve defined study goals;
7. Identify risks for the successful execution of the study and draft a risk management plan;
8. Formulate intermediate targets that allow for measuring progress towards the final goals;
9. Draft a plan for ensuring gender equity;
10. Define scenarios that will be considered in the study: the most recent published scenarios for regional climate change in the Mediterranean and relative sea-level rise (including soil subsidence) should be used and the most recent plans for urban development published by the Government of Egypt;
11. Develop in cooperation with MWRI/SPA and other key partners such as EEAA, an Action Plan in which the methodologies of the Technical Proposal are further elaborated. The Action Plan includes a timetable for each of the study tasks, a schedule for achievement of results and inputs and, if necessary, a revised Logical Framework;
12. Organize meetings and workshops to inform stakeholder organizations about the launch of the study, to present and discuss the Action Plan, its wider and specific objectives as well as organizational requirements related to the study implementation.
13. Review and update (if needed), in consultation with the client and stakeholders, the coastal units (also called study level units) that was developed as part of the ACCNDP ICZM scoping study. As part of this task a section in the inception report needs to be prepared describing, in detail, the criteria that was used to specify the boundaries of each coastal unit.

14. Develop GIS-based maps for the implementation phase which should be aligned with the local administrative units of the governmental organizations.

#### Deliverable 1.0.0: Inception Report

The Inception Report presents the information gathered and results obtained during the inception phase. It will be delivered 6 months after the start of the study at the latest. The Inception Report will also present a detailed plan for the following study stages and detailed descriptions of the products that will be delivered. It should also highlight deviations (if any) from the proposed methodologies at the proposal stage.

#### TASK 1: COASTAL VULNERABILITY AND RISK ASSESSMENT

The assessments will be performed for different scenarios: current situation and future scenarios, considering climate change and anticipated urban (i.e. social and economic) development over a period of 25 to 100 years. The risk assessment will be performed at two different geographical scopes and scales: national for the whole north coast (following the hazard assessment performed under the ICZM Scoping Study within the ACCNDP project) and local at selected priority areas. The selection of new priority areas (additional to the priority areas identified in the ICZM Scoping Study) is based on several factors (including, but not limited to, the national development vision priorities, and the national mega projects plan) in addition to the risk ranking resulting from the national-scale assessment. The risk assessment of the priority areas will provide major input for detailed risk alleviation plans. Task1 focuses further on the development of national capabilities to conduct long-term climate change risk-induced hazard, vulnerability and high-resolution risk assessments of erosion and flooding under climate change scenarios on an ongoing and iterative basis. This task will include training in methods for the characterization of marine dynamics, establishment of databases and tools to model shoreline dynamics, high-resolution (HR) hazard assessment, and HR exposure, vulnerability and risk assessment. The results of the process will lead to the selection of the next set of priority areas. Task 1 will involve the following major sub-activities:

##### **Sub-Task 1.1: Databases and numerical simulation models**

This task establishes databases and numerical simulation models for oceanic conditions at the North Egyptian coast. The databases will comprise bathymetric data, wave data and water level data obtained from existing observations and, if needed, additional surveys done by the Client. The numerical models are validated with wave and water level data at the coast, in particular for storm conditions. The models will be used for analyzing the influence of climate change on oceanic conditions, for different climate change scenarios. The models shall include the coastal lakes which are connected to the sea. Particular emphasis is given to conditions which are critical for coastal flooding. The models will provide sets of boundary conditions that will be used for coastal risk assessments.

**Deliverable 1.1.1:** Numerical process-based model for translating oceanic boundary conditions into hydrodynamic conditions at the North Egyptian coast with detailed user guides and manuals.

**Deliverable 1.1.2:** Report and database of hydrodynamic conditions in the coastal zone which are pertinent for studies of risk assessment and for studies of coastal erosion for different climate change scenarios.

##### **Sub-Task 1.2: Shoreline evolution**

This task establishes coastal modeling systems consisting of databases, methods and tools suitable for modeling shoreline dynamics at the North Coast. The Consultant shall collect data of sedimentary characteristics (grain size distributions) in the North Egyptian coastal zone from available sources, and complement the dataset, if necessary, through additional surveys. The models will simulate sediment transport in relation to coastal erosion and accretion. They will be validated with observed sedimentation-erosion patterns along the Egyptian North Coast reported in the literature and, if necessary, by field surveys. The models are used to analyze the impact of climate change on coastal erosion-sedimentation along the Egyptian North Coast, for different scenarios. Measures to mitigate erosion will be proposed according to the

characteristics of each coastal site. These measures will be discussed with the Client and the effectiveness of these measures will be assessed. The deliverables should be downscaled and aligned with the national administrative borders or boundaries (Provinces (Marakez), Cities, Villages) which are adopted by the national governmental organizations in Egypt.

**Deliverable 1.2.1:** GIS-based map of sediment characteristics in the North Egyptian continental shelf.

**Deliverable 1.2.2:** Numerical model for simulating sediment transport and coastal erosion/sedimentation with detailed user guides and manuals.

**Deliverable 1.2.3:** Report on projections for coastal erosion for different scenarios of climate change and relative sea-level rise.

### **Sub-Task 1.3: Conducting hazard assessment under climate change**

This task delivers high-resolution flood risk maps that account for storm surge inundation under different scenarios for climate change and relative sea-level rise. The flood risk maps make use of fine-scale topographic maps of the coastal zone obtained from the best available digital elevation model(s) and include projections for soil subsidence. Flood risk maps (for different recurrence times) will be produced based on the current and anticipated conditions of the existing defenses and flood defenses that are currently under construction or planned. The deliverables should be downscaled and aligned with the national administrative borders or boundaries (Provinces (Marakez), Cities, Villages) which are adopted by the national governmental organizations in Egypt.

**Deliverable 1.3.1:** GIS-based fine-scale topographic maps of the coastal zone for different scenarios of soil subsidence.

**Deliverable 1.3.2:** Numerical process-based coastal zone flooding model with detailed user guides and manuals.

**Deliverable 1.3.3:** High-resolution GIS-based flood risk maps of the coastal zone for different scenarios of climate change, relative sea-level rise and urban development.

### **Sub-Task 1.4. Sea water intrusion and groundwater level**

Urban development in the coastal zone can be highly impacted by rising levels of the groundwater table, surface soil salinity and sea water intrusion in the Nile aquifer. The issue of surface soil salinization is compounded by increasing water demand and potential decrease of Nile discharges to the coastal zone. The Consultant shall collect existing data on the structure of the upper soil layers (e.g. subsoil permeability, thickness of clay caps, presence of boils) in the lowest and most impacted parts of the coastal zone (with high seepage of saline groundwater to the surface), together with the present groundwater level and groundwater salinity, and establish a corresponding GIS database. For these most impacted coastal zones a groundwater model has to be developed, taking into account existing irrigation practices. The model will be used to analyze the salt balance and changes in groundwater level and soil salinization under different scenarios for relative sea-level rise and soil subsidence. Questions to be addressed are: Can further soil salinization be prevented and in which way? What are the consequences of further soil salinization and how can this be dealt with?

**Deliverable 1.4.1:** Numerical process-based model of groundwater flow and salt intrusion for the most impacted zones with detailed user guides and manuals.

**Deliverable 1.4.2:** GIS-based maps of groundwater level and soil/groundwater salinity in the most impacted parts of the coastal zone, for different scenarios of sea-level rise and soil subsidence, downscaled and with the local administrative borders and boundaries (Provinces (Marakez), Cities, Villages).

### **Sub-Task 1.5: Assessment of vulnerability and risks**

This task will provide high-resolution assessments of vulnerability and risk under scenarios of climate change and urban development. This Consultant will evaluate the impact of climate change on social and economic development of the coastal zone through flooding risk, coastal erosion, groundwater level and groundwater salinity for different scenarios. The assessment of vulnerability and risks need to be complemented by results of existing field surveys and risk assessment studies in case they are made available to the consultant. The deliverables should be downscaled and aligned with the national administrative borders or boundaries (Provinces (Marakez), Cities, Villages) which are adopted by the national governmental organizations in Egypt.

**Deliverable 1.5.1:** High-resolution GIS-based map of land cover (agricultural, urban areas, fishery, etc.), infrastructure (roads, canals, etc.) and other key sites (environmental, cultural, archeological, etc.) in the North Egyptian coastal zone.

**Deliverable 1.5.2:** High-resolution GIS-based map of urban, social and economic impacts and risks related to flooding, coastal erosion, soil subsidence, and groundwater level and soil salinity under different scenarios.

**Deliverable 1.5.3:** Report containing an analysis and explanation of urban, social and economic impacts.

**Deliverable 1.5.4:** High-resolution GIS-based map of vulnerability rankings in the North Egyptian coastal zone.

**Deliverable 1.5.5:** High-resolution GIS-based maps for the future key Issue related to future land-use and environmental conflicts at study level units including future negative impacts of current developments on coastal ecosystems, e.g., future Urban developments on coastal ecosystems or protected areas, Polluted water bodies due to future industrial, agricultural or aquaculture activities, and areas potentially affected by extraction of black sands.

**Deliverable 1.5.6:** High-resolution GIS-based Maps at the study level units scale for the Climate change impacts on socioeconomic systems and ecosystems, including but not limited to:

1. Economic loss (US\$).
2. Social loss.
3. Environmental loss.
4. Urban loss.

**Deliverable 1.5.7:** GIS-based maps for priority areas at high risk using risk-sensitive land use, infrastructure and coastal development planning.

### **Sub-Task 1.6: Measures and their effectiveness**

In this sub-task the effectiveness of different measures that may contribute to reduce flood risks, coastal erosion and seepage of salt groundwater through the soil surface layer are evaluated for different scenarios of climate change. The results provide crucial input to coastal planning policies and measures. Potential impact of the selected measures on biodiversity and integrity of the coastal ecosystems also need to be assessed. The deliverables should be downscaled and aligned with the national administrative borders or boundaries (Provinces (Marakez), Cities, Villages) which are adopted by the national governmental organizations in Egypt.

**Deliverable 1.6.1:** Report on the effectiveness and costs of measures to mitigate coastal erosion for venerable sites along the North Egyptian coast.

**Deliverable 1.6.2:** Report on the effectiveness and costs of measures to reduce flood risks under different scenarios of SLR and extreme weather events.

**Deliverable 1.6.3:** Report on the effectiveness and costs of measures to control salt water intrusion into groundwater levels and its impacts on soil salinization.

**Deliverable 1.6.4:** Report on the assessment of potential impact of the selected measures on biodiversity and integrity of the coastal ecosystems.

**Deliverable 1.6.5:** GIS-based maps for the current and future key issues related to coastal risks in north coast at study level units including:

- Negative consequences that erosion may cause on economic activities or infrastructures.
- Negative consequences that flooding may have on economic activities or infrastructures.
- Negative consequences that siltation may cause on economic activities or infrastructures.
- Negative consequences that overtopping may cause on port activity.
- Negative intrusion in coastal aquifers.
- Loss of marine habitats.

**Deliverable 1.6.6:** GIS-based maps at the study level units for the potential impacts of climate change on north coast, including, but not limited to the following indicators (*as defined at ACCNDP ICZM scoping study Report*):

#### Erosion

*Sediment Transport Indicator (STI)*

*Long Term erosion Indicator (LTI)*

*Beach Erosion Indicator (BEI)*

*Coastal Erosion Indicator (CEI)*

*Assignment to coastal points, the erosion index*

#### Flooding

*Beach Flooding Indicator (BFI)*

*Coastal Flooding Indicator (CFI)*

*Assignment to coastal points, the flooding index*

#### Saltwater intrusion

*Coastal aquifers and sea level rise*

*Saltwater intrusion index*

## Abiotic stress

*Probability of occurrence of Posidonia oceanica*

*Posidonia oceanica index*

## Drought

*Consecutive dry days and very wet days*

*Consecutive Dry Day (CDD) and very wet day indicators*

*Drought index*

## Heat waves

*Strong stress heat wave frequency and duration*

*Strong stress Heat Wave (SHW) frequency and duration indicators*

*Heat wave index*

## Port downtime

*Agitation and overtopping exceedance*

*Agitation-based and overtopping-based operability indicators*

*Port downtime index*

## Siltation

**Deliverable 1.6.7:** Prepare a Computer application for performing Cost & Benefit analysis to evaluate the potential interventions for ICZM project in the north coast at the study level units.

### **Sub-Task 1.7: Skills for operating and maintaining coastal observation and model systems**

Egyptian experts will be trained to master and operate the coastal observation and model systems that will be developed within the study. Experts from institutions responsible for monitoring and forecasting coastal processes will be selected by the Client to participate in the training program in addition to representatives from the key stakeholder organizations. The Consultant shall ensure that they will acquire the necessary knowledge and know-how to operate and maintain the coastal observation and model systems autonomously. The scientific and technical background, the operation mode and maintenance of all the systems shall be thoroughly documented and explained in training materials. Progress in the acquisition of skills will be regularly evaluated and the training program will be adapted if needed.

**Deliverable 1.7.1:** Development and implementation of a training program for mastering the coastal observation and model systems.

## **TASK 2: DEVELOPMENT OF A CLIMATE RESILIENT INTEGRATED COASTAL ZONE MANAGEMENT PLAN (ICZM PLAN)**

This task focuses on the development of a risk-informed climate resilient ICZM plan that includes for each coastal unit, but not limited to, a set of adaptation measures, a legislative/institutional/administrative framework for implementation of the plan and a shoreline management plan (SMP), in separate sub-tasks. It is anticipated that the complete process for development and launch of the ICZM plan including the supporting framework will be finalized by the end of the study. However, it is expected that there will be outputs from the ICZM plan as the study progresses. Accordingly, implementation of the urgent coastal protection measures will overlap with the development of the ICZM plan. The ICZM plan is essentially a

process and planning instrument that defines the objectives and measures (urban, environmental, social, legal, institutional) necessary to achieve a climate-resilient sustainable development of the North Coast. Particular attention should be given in the study to the situation of poor people in high-risk coastal zones. Task 2 involves the following major sub-tasks:

### **Sub-Task 2.1: Development of a legal/institutional/administrative framework for a climate change resilient coastal zone**

Effective implementation of a climate resilient ICZM plan might require an adjustment or re-establishment of the existing legal, institutional and administrative frameworks.

This task will be based on a literature review and analysis of past and current initiatives related to the development and management of the North Coast of Egypt. Non-documented information will be obtained by interviewing experts from Egyptian institutes (including universities) and staff of national and regional governmental institutions. This information will be organized in order to analyze the current legal, institutional and administrative framework and to identify existing impediments to the implementation of ICZM: areas of conflict/overlaps and gaps, related to, inter alia, currently implemented responsibilities and authorities among different parties, managerial and technical capacities, rules and practices for disputes and conflict resolution, rules and practices for enforcement, penalties and liability, rules and practices for public participation, stakeholder involvement, access to information, etc. The consultant must also review and amend the current governance structures for implementation of emergency measures when early warnings are issued for extreme climatic conditions in the coastal zone. The analysis will result in a series of recommendations for streamlining administrative procedures and legislation for the implementation of integrated coastal zone management.

**Deliverable 2.1.1:** Report on legal, institutional and administrative frameworks for a climate change resilient coastal zone with recommendations for improvement and possible routes to implement those recommendations downscaled and aligned with the local administrative units. This report should include, but not limited to the following:

- An action plan for ICZM implementation in consensus with key stakeholders at each local administrative unit.
- Prerequisites for ICZM in terms of capacity building at different governance levels.
- Administrative procedures for ICZM Plan development and implementation under regulatory system (laws, regulations, decrees, etc) at each local administrative unit.
- Defining the roles and competences of key stakeholders regarding ICZM implementation under the regulatory system at local study units.

**Deliverable 2.1.3:** Organize a number of workshops with key stakeholders to discuss the different alternatives for improving the regulatory framework including representatives from the related local administrative unit.

### **Sub-Task 2.2: Development of a framework for stakeholder participation and decision-making**

This task ensures a shared ownership of the climate resilient ICZM plan with concerned parties and civil society groups in the planning process. The implementation of ICZM principles requires steps to overcome obstacles related to the centralized and less coordinated governance structure in Egypt. The implementation will take advantage from the lessons learnt during this study; in particular the ICZM pilot projects (Task 5). The Consultant will analyze the experience of cooperation among different governmental organi-



zations and the experience of public participation within the study. An important challenge is the co-production of a coastal management strategy by all relevant governmental organizations, in a process where different regional and sectoral plans are mutually adjusted for the optimization of societal benefits.

A broad governmental and public participation is essential for achieving support and constructive involvement of all relevant actors and stakeholders during the development and implementation of the ICZM plan. Stakeholder consultation is envisaged to be an open and dynamic process that should be organized throughout the study and afterwards. The Consultant will communicate with stakeholders in order to achieve a broadly shared recognition and understanding of present and future coastal issues (awareness raising based on results of task 1). At the start of the study the Consultant will collect all ideas of actors and stakeholders, which will be considered when developing proposals for possible solutions. Appropriate communications mean in Arabic language will be developed for involving stakeholders in the ICZM process. The Consultant will present and discuss study progress in open meetings organized by the Egyptian authorities. The Consultant shall also prepare a public website explaining the study, with up-to-date information and with a section for interaction with the public, where stakeholders can enter their comments and suggestions. The results of the consultations will be summarized in a document that will be publicly available in a paper version and on the website (in English and Arabic languages).

**Deliverable 2.2.1:** Report: Inventory of major public and private stakeholders and stakeholder organizations (national governmental level, governorate level, civil organizations, and private parties) that may affect or be affected by coastal management policies and interventions. The representation of women in the stakeholder groups should be stimulated and recorded.

**Deliverable 2.2.2:** Communication plan: Outline of the process (and the means) through which stakeholders will be involved in the ICZM process and the development of climate resilient ICZM plan downscaled and aligned with the local administrative units.

**Deliverable 2.2.3:** A website for sharing information and for interaction with stakeholders and the public (in Arabic and English).

**Deliverable 2.2.4:** Document summarizing the results of the consultations and their incorporation in the study (in Arabic and English).

**Deliverable 2.2.5:** Hold a number of workshops to:

- Improve coordination at the planning level, horizontally, between central organizations, and vertically, between central organizations and organizations at the local level.
- Help in integrating laws, plans, regulations, and agreements to overcome difficulties and facilitate the implementation process of ICZM projects to make a real difference on the ground and be reflected on the day-to-day work of executive agencies and communities.
- Propose and develop national policies and frameworks for crises and disasters management and disaster risk reduction.

**Deliverable 2.2.6:** A mobile application to facilitate communication and coordination between stakeholders to ensure the adoption of ICZM principles and climate change adaptation strategies under development plans (urban, tourism, industry, agriculture and aquaculture, etc.) at local administrative units.

### **Sub-Task 2.3: Elaboration of the ICZM plan**

The ICZM plan is elaborated at the scale of coastal units, defined in the Inception Phase. The ICZM plan thus consists of sets of local-scale measures embedded in an overall framework which ensures consistency regarding physical, environmental, legal, institutional and administrative conditions. In the local-scale ICZM plans consideration is given to aspects such as:

- Topographical and geomorphologic elements
- Climatic conditions and climate change impacts
- Water availability and quality (surface water and groundwater)
- Marine/terrestrial ecosystems and natural resources
- Jurisdictional and institutional arrangements, administrative procedures and responsibilities
- Land cover, land use plans and land ownership
- Population characteristics (demography, health, education, literacy)
- Economic development and employment
- Public services (Education, Health, Culture, Sports, etc)
- Transportation networks
- Infrastructure (Communications, Water networks, Waste Water networks, waste disposal collection and treatment, energy)
- Historical-cultural heritage

The ICZM plans should ensure sustainable development and biodiversity conservation, respecting the carrying capacity of the natural system. The Consultant shall indicate for which plans and measures a Strategic Environmental Assessment (SEA) or an Environmental Impact Assessment (EIA) is required. The present study provides major input for these assessments, but the preparation of SEA or EIA documents is beyond the scope of the study, except for the pilot projects in Task 5.

**Deliverable 2.3.1:** A climate resilient ICZM plan, defining objectives and options for site-specific measures (e.g. coastal defense structures, managed retreat, set-back lines, regulations for land-use and constructions, mitigation and contingency plans, setting of safety standards, etc.) necessary to achieve a climate-resilient development of the North Coast. Special attention shall be given to the situation of women and poor families. The ICZM plan also should propose a realistic pathway towards implementation, based on a cyclic policy process (specified in sub-task 2.5).

**Deliverable 2.3.2:** A report showing the costs of ICZM plan implementation and the different feasible funding mechanisms to ensure a long-term funding for ICZM projects, including, funding from international donors and national budget.

### **Sub-Task 2.4: Development of a Shoreline Management Plan (SMP) for climate change adaptation**

This plan defines the most promising shoreline management measures for climate change adaptation, and their implementation approach. The Consultant will develop a set of options for possible alternative shoreline management approaches, according to the specific characteristics of each coastal site. These approaches may include, inter alia, hard and/or nature based defense structures, sediment management, shore nourishment and appropriate vegetation types for fixing soft coastal defenses. Impacts of the selected approaches on biodiversity will be assessed and, if necessary, mitigation measures should be recommended. The strategies are site specific, will be developed in consultation with local stakeholders and take into account the development objectives at the national and local levels. Whilst undertaking this task, it has to be noted that a number of sites require a special attention, such as Port Said. This is due to the developments in the Suez Canal Economic Zone, local soil subsidence and the Green City Initiative of West Port Said. For those sites, general guidelines need to be prepared, in consultation with the competent

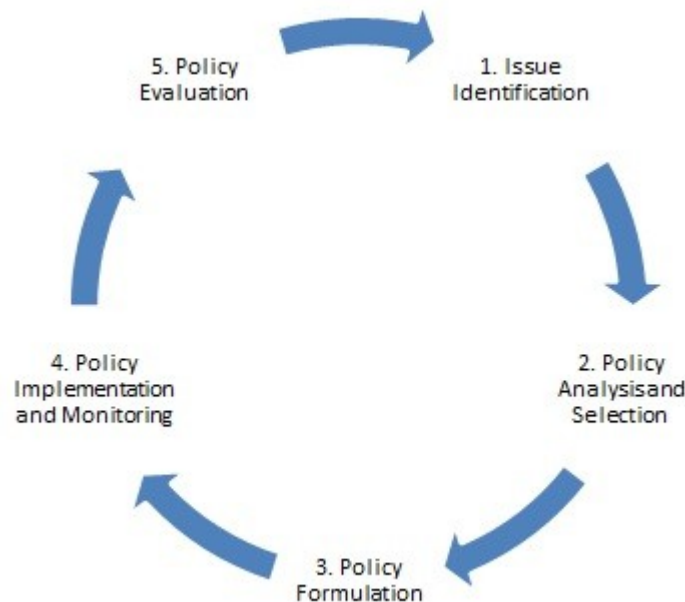
Egyptian authorities, in order to ensure the consistency along the Egyptian North Coast (avoiding adverse interactions) and to ensure compliance with existing legal, institutional and administrative arrangements. The SMP should further include a monitoring program for regular inspection of the condition of coastal defense structures. The effectiveness of different measures for mitigating flood risk and erosion is assessed by subtask 1.6 for different scenarios. The SMP shall evaluate the different options by comparing costs of avoided risks, additional development benefits (social and economic) and construction and maintenance costs of shoreline management measures.

**Deliverable 2.4.1:** A report that describes different shoreline management options with an assessment of each option at study level units. This report should include GIS based maps showing the assessment of the shoreline management options.

**Deliverable 2.4.2:** Shoreline Management Plan for the entire North Egyptian coast (site specific) down-scaled and aligned with the local administrative units.

### **Sub-Task 2.5: Establishment of the ICZM monitoring and evaluation system**

This task will enable authorities to take appropriate corrective actions to achieve the expected results of the plan by evaluating the progress of the plan implementation. The development and implementation of ICZM is a dynamic and flexible process in order to incorporate upcoming issues, external developments and new insights from learning by doing. This requires an adaptive approach, following a cyclic policy process, with regular reporting to the government on the progress towards measurable targets, based on monitoring and assessment. The Consultant shall prepare a proposal for implementation of the following policy cycle:



For each step of the cycle, a specification shall be given in the proposal: institutional embedding, actors, responsibilities, actions. Progress evaluation requires clear targets for each policy cycle. Considering the ICZM stakeholders, the Consultant shall define measurable targets for progress evaluation in the implementation of ICZM and climate change adaptation of the northern Egyptian coastal zone; the consultant should also define a number of measurable targets for biodiversity conservation. The report shall indicate how these targets can be monitored and propose a reporting plan and how to incorporate new data and new insights that may require adjustment of the climate resilient ICZM Plan. The Consultant shall also specify which actions are required for the process of updating and adjusting the climate resilient ICZM plan downscaled to local administrative units.

**Deliverable 2.5.1:** Proposal for implementation of the policy cycle for Integrated Coastal Zone Management of the northern Egyptian coastal zone downscaled and aligned with the local administrative units.

**Deliverable 2.5.2:** Definition of measurable targets and required monitoring to evaluate progress in the implementation of ICZM and climate change adaptation.

### **Sub-Task 2.6: Initiate implementation of the climate resilient ICZM plan**

Submission for the endorsement of the ICZM plan to the governmental authorities responsible for the implementation. The Consultant will assist the Client at the launch of ICZM. The Consultant will prepare a summary of the plan for policymakers, showing the clear benefits of having an ICZM plan, highlighting the urgency of ICZM and climate change adaptation in the coastal zone (present and future risks according to the results of task 1, risk of lost opportunities), dealing with existing obstacles for the implementation (reflecting e.g., the experience of the present and past projects) and proposing a realistic pathway for the implementation in Egypt.

**Deliverable 2.6.1:** Summary of the ICZM plan for policymakers (in English and Arabic languages).

**Deliverable 2.6.2:** Assistance of the Consultant to the preparation of meetings where the ICZM plan is presented to authorities involved in the implementation.

## **TASK 3: CAPACITY BUILDING**

This task focuses on the development and implementation of a capacity building program on ICZM and climate change risk management for institutions and stakeholders involved in the long-term management of the Egyptian North coast. Qualified and well-trained staff is a key factor for successful implementation of ICZM principles. The actual situation is characterized by scarcity of well qualified staff and a high staff turnover in many positions. Well-planned and targeted capacity building measures shall contribute to a more efficient and effective work force and, hence, better ICZM implementation results.

The capacity building program will create the basis for a thorough understanding of various aspects of coastal management for ICZM and climate change adaptation, as well as promoting collaborative networks equipped with the necessary skills, knowledge and attitudes to undertake different tasks involved in the climate change adaptation and planning of the coastal areas of Egypt. The framework for the program will aim to identify gaps and corresponding capacity needs relative to key implementation issues, and to build capacity of individuals and institutions to implement ICZM. It will involve the following major sub-tasks:

### **Sub-Task 3.1: Assessment of capacity needs for ICZM planning**

Inventory of on-going coastal management capacity building activities and identification of gaps in skills, knowledge and attitudes for the practice of ICZM and climate change adaptation. This task should also target raising the awareness and capacity building in fields of biodiversity conservation and sustainable development. Definition of training objectives in quantity and quality, with quantitative indicators to measure progress in the acquisition of skills and knowledge.

**Deliverable 3.1.1:** Report on needs for capacity building and training within organizations involved in coastal zone management in Egypt.

### **Sub-Task 3.2: Training program for governmental staff**

Based on a Training Needs Assessment, the Consultant will develop a Training Program for covering the needs of stakeholders involved in coastal management and climate change adaptation. It is anticipated that a mix of training methodologies will be used, including on-the-job support, formal training, webinars, case studies and practical applications which mirror real work situations as much as possible. The target audience will be selected by stakeholders in the inception phase of the study and will include managerial and technical staff of, for example, MWRI, SPA, EEAA and Local administration officials. The trainers will prepare a training manual in Arabic, which can be used by trainees to continue training activities after

study completion. A Training of Trainers (ToT) program should accompany this capacity building program. The consultant needs to provide assistance to initiate this ToT program.

**Deliverable 3.2.1:** Design and implementation of a modular training program for stakeholders to build skills for professional development of coastal management practitioners, in a diversity of capacities (e.g. policy positions, day-to-day management and dealing with the national and local media).

**Deliverable 3.2.2:** Design and assistance to initiate a corresponding ToT program.

**Deliverable 3.2.3:** Training courses for officials of government agencies and relevant stakeholders to enhance their capacity on integrating climate-related risks in their planning and considerations.

**Deliverable 3.2.5:** Dissemination of the training materials and courses on the study website in the form of, for example, webinars or any other similar means.

### **Sub-Task 3.3: Training workshop at coastal governorates**

Broad participation of all relevant local actors and stakeholders is essential for achieving support and constructive involvement during the development and implementation of ICZM and climate change adaptation. Therefore, in this task, the Consultant shall organize ICZM training workshops at coastal Governorates. Participants will be selected by the coastal Governorates from their staff and other relevant local coastal stakeholders. The workshops will enable participants to collaborate and actively participate in the implementation of ICZM.

**Deliverable 3.3.1:** ICZM training workshops at the coastal Governorates

**Deliverable 3.3.2:** Training courses for officials at the coastal governorates to strengthen crises/disasters management and disaster risk reduction using recent advanced technologies.

**Deliverable 3.3.3:** Webinars for providing easily understandable information on disaster risks and protection options to all citizens.

**Deliverable 3.3.4:** Provide access to all training material developed in this sub-task in the form of webinars on the study web sites to extend the benefits of the training program.

### **Sub-Task 3.4: Monitoring and evaluation of the capacity building program's results**

The progress made by participants in mastering the curriculum of the capacity building programs shall be monitored and evaluated. The program will be adjusted if difficulties in the transfer of knowledge and skills are signaled, in order to ensure sufficient progress in the acquisition of capacities. By the end of the programs the trained staff should have acquired a good level of expertise in the fields in which they have been trained and capable to act autonomously. The representation of women in the capacity building programs shall be recorded.

**Deliverable 3.4.1:** Report on evaluation of the capacity building programs.

## **TASK 4: COASTAL MONITORING AND INFORMATION CENTRE**

This task focuses on the implementation of a Coastal Monitoring and Information Centre (CMIC). Several components of a CMIC are already in place at the National Water Research Center (NWRC). However, important data gaps still exist and an operational integrated coastal information system has not yet been established. Such a system would need to include operational acquisition of meteorological data (e.g. temperature, wind speed and direction), oceanographic data (e.g. tide levels, waves), bathymetric data, environmental data (such as turbidity, chlorophyll, oil spills), main/selected biodiversity monitoring data and land-level observation. Most crucial is the data needed for operational forecasting. The Consultant must investigate the most efficient methods for data acquisition, for example, using where possible remote

sensing techniques in combination with ground-truth information, mathematical analysis techniques and numerical models. The Consultant shall advise regarding the observation systems and equipment specifications required for the CMIC, considering the systems and equipment already available and operational at MWRI, NWRC and other Egyptian organizations involved in the study. This should take into account the risk that equipment installed in situ is prone to damage or theft. To overcome a lack of high-quality data to inform planning decisions, it will be important to engage government authorities and relevant agencies in a consensus-driven stakeholder engagement approach to coordinate data collection/analysis responsibilities. The Consultant shall also examine the possibilities for supplementing the Egyptian oceanographic monitoring program with data obtained from international cooperation programs such as the Copernicus Marine Environment Monitoring Service of the European Union. International observation programs for the Mediterranean region may provide the boundary conditions for the Egyptian hydrodynamic coastal models.

Real-time forecasts of water levels and waves should be produced for early warning of coastal hazards and for operational shoreline management. Because of the intensive shipping traffic of hazardous substances, accidental pollution is also a potential source of coastal hazards for which adequate observation systems and simulation models are required. Nearshore bathymetry should be carefully monitored, particularly the evolution of beach profiles (from the dry beach down to the closure depth) with special attention for scouring at the toe of coastal defense structures. The monitoring program should include regular survey of the condition of coastal defense structures. Monitoring will be combined with modelling of sediment transport, sediment budgeting, accretion and erosion.

The CMIC must be designed in such a way that it can meet the following requirements:

- Delivery of high-quality forecasts in operational and real-time mode of events threatening the North Egyptian coastal zone (threats of flooding, loss of life, loss of assets, environmental damage) and requiring urgent protection / adaptation measures;
- The annual delivery of trends in oceanic conditions (sea levels, waves) and trends in coastal erosion;
- Providing long-term estimates of the impact of climate change on the coastal environment;
- Permanent availability of forecasts, minimal downtime (requiring some redundancy of equipment and systems, backup facilities, emergency power supply, etc.).

For real-time forecasts and Early Warning, the CMIC must closely cooperate with the Egyptian Meteorological Institute, which provides storm and wind forecasts of the South-East Mediterranean on an operational basis.

This task will involve the following major sub-activities:

**Sub-Task 4.1:** Provide full specifications of the required observation/monitoring equipment<sup>2</sup> and data transmission systems for meteorological, oceanographic and coastal conditions. The specification should include the location and number of each piece of equipment.

**Deliverable 4.1.1:** A report detailing the specifications and a detailed implementation plan of the operational National Observation System (NOS) in the northern coast of Egypt.

**Sub-task 4.2:** Design and implementation of a software system for real-time processing of wind, wave and water level data. Design and implementation of a system for verification of collected data (bathymetry, wind- and wave climate and water levels), data storage and online open access in user-friendly formats.

**Deliverable 4.2.1:** Operational data processing system (multiple inputs, multiple uses).

**Deliverable 4.2.2:** Operational data storage and dissemination system.

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<sup>2</sup> Procurement of the equipment will be financed through a separate budget.



**Sub-Task 4.3:** Design and implementation of a system of numerical models for producing real-time forecasts of waves, currents and water levels and for producing trend analyses and long-term forecasts of wave climate, storm surges statistics and coastal erosion/accretion. The system will also include numerical models capable of simulating the fate of accidental oil spills. The models should be based on the most advanced numerical simulation models (preferably open source models and /or freeware<sup>3</sup>) with proven quality from world-wide applications. The models will run permanently in automatic mode, with continuously updated input data, continuous assessment of the accuracy of previous forecasts and subsequent model optimization. (This sub-task should be carried out in connection with sub-task 1.1)

**Deliverable 4.3.1:** Operational model system for forecasts and analysis.

**Sub-Task 4.4:** Design and implementation of the Coastal Monitoring and Information Centre.

This sub-task includes:

- Design of the operation scheme of the CMIC: data and information flows, CMIC system components, interconnections and staff needed to carry out the different tasks;
- Installation of the CMIC: fully equipped desks for the CMIC operators;
- Operation of the CMIC: Manual (English/Arabic) with a detailed description of all operational processes;
- Reporting system for the different CMIC products;
- Establishment of qualification requirements of CMIC operators;
- Training of CMIC operators (as part of sub-task 1.7);
- Establishment of a program for maintenance / updates with cost estimate.

Procurement of furniture and ICT hardware (computers, displays, switches, cables, etc.) will be financed through a separate budget.

**Deliverable 4.4.1:** Operational CMIC.

**Sub-Task 4.5:** Design and implementation of a quality control/assurance program among the participating institutions and agencies for the collection, evaluation, and distribution of data generated from the various components of the Coastal Monitoring and Information Centre. Performance indicators must be established for evaluating the quality and effectiveness of the CMIC, referring for example to the timely delivery of forecasts and data, the accuracy of forecasts, the downtime of data acquisition and modeling systems, training level of staff, frequency of calamity exercises, etc.

**Deliverable 4.5.1:** Quality control/assurance system of the CMIC

**Sub-Task 4.6:** An Early Warning System (EWS) will be included with the CMIC in order to increase the preparedness of various parties in addressing the conditions of extreme climate. With this technology, coastal communities (fisherman and farmers but also the general public) can reduce their exposure to the negative impacts related with extreme climate and plan more proactively for their activities, thus reducing the losses that they may suffer because of the extreme climate and weather events (drought, storm etc.).

**Deliverable 4.6.1:** A report including an evaluation of the need to and design of an EWS talking into account the various factors, such as the quality of available data, the availability of resources for reliable forecasting provision and the level of cooperation between the government, relief agencies and local communities. Report needs to also include Evacuation plans priorities at the study level units.

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<sup>3</sup>If proprietary models are used, enough licenses need to be included within the consultant proposal.

**Deliverable 4.6.2:** Design of a mobile application for the Early Warning System to facilitate the communication between various stakeholders and local communities.

#### **TASK 5: ICZM PILOT PROJECTS**

In the past, various ICZM plans have been developed for specific regions in Egypt. With the exception of few, the measures proposed in these plans have not or hardly been put into practice. The reasons for the lack of implementation must be analyzed; the results of this analysis have to be taken into account in the current study to prevent the same fate. It is expected that main shortcomings relate to deficiencies in the legal, institutional and administrative framework. Therefore, at least, two pilot sites shall be proposed by the Consultant, in consultation with the Client, where the ICZM plan developed for these sites will be put into practice. The pilot sites should have contrasting characteristics in terms of location, socio-economic conditions and type of risk. The sustainable urban development criteria should be included when selecting the pilot sites, including, but not limited to, the locations of national development projects, and the ICZM stakeholder priorities. The implementation of the ICZM plans at these pilot locations will be a collaborative effort of the Consultant and the Client. Depending on the measures, it may be necessary to carry out an Environmental Impact Assessment prior to implementation. If this is the case, the underlying technical documents for the EIA will be prepared by the Consultant. The Consultant shall monitor the implementation process and evaluate the results, which will be used to optimize the ICZM plan.

##### **Subtask 5.1: Implementation of ICZM plan for pilot site 1**

**Deliverable 5.1.1:** Evaluation report of the implementation of ICZM plan for pilot site 1

##### **Subtask 5.2: Implementation of ICZM plan for pilot site 2**

**Deliverable 5.2.1:** Evaluation report of the implementation of ICZM plan for pilot site 2

##### **Subtask 5.3: Adjustment of the ICZM plan (task 2) on the basis of the evaluations of site 1 and site 2**

**Deliverable 5.3.1:** Adjustments of the ICZM plan (task 2) to take into account the lessons learnt from the pilot projects for site 1 and site 2

#### **OTHER DELIVERABLES:**

Besides the above, the Consultant shall transfer to the Client all the materials produced in the framework of the study. This includes:

- All software systems developed for the Coastal Monitoring and Information Centre;
- All manuals for operating and maintaining the software systems;
- All communication materials used for presentations in stakeholder meetings;
- All documents used at capacity building and training sessions.

There should be no restrictions on the use of these materials by the Client. All software systems must be available for the Client without restrictions during and after the completion of the study.

The Consultant must also provide the following progress deliverables:

- quarterly, a report on the progress of the study implementation (deliverables, spending of man-months and finances), in which deviations from the planning are explained and any corrective measures are indicated;
- annually, a progress report that will be submitted to the Steering Committee, for decisions on adjustment measures that might be necessary;



- At the end of the study, a final report indicating the extent to which the project goals have been realized and all proposed projects by the study should be supported by ‘*Project Cards*’ including description, implementation details, workplan and estimated budget for implementation.

## THE CONSULTANT’S EXPERIENCE AND TEAM

The consultant must be an organization or a group of organizations with demonstrable experience in the various disciplinary fields relevant to the study. The Consultant shall therefore specify the major projects carried out during the past ten years that demonstrate this experience. The role of the Consultant in these projects should be specified as well as the outcomes achieved.

The Consultant’s team has a crucial role in implementing the study. It is anticipated that the team will comprise key and non-key experts. The following key experts are expected to be part of the team and should be permanent staff of the Consultant. The Consultant must include an Egyptian partner in his team. The more involvement of the Egyptian partner(s) in the study will be an advantage.

### **Key Expert 1: Team Leader**

A team leader will be required for the duration of this contract. The team leader is a senior professional, responsible for overall management of the study, setting key benchmarks and targets and providing overall technical and managerial guidance for study staff and work partners.

Required qualifications and skills:

- University degree in a relevant discipline (coastal, marine or environmental engineering, urban development, or other relevant discipline), preferably at PhD level;
- Experience in working with governmental institutions in international projects;
- Experience of at least 15 years with management of large international projects related to coastal management and climate change adaptation;
- Experience of at least 15 years with leading large teams of professionals;
- Fluency in written and spoken English.

Specific assets:

- Knowledge of Arabic is preferable but not mandatory;
- Experience with project management and planning in Egypt or in countries with similar conditions and comparable settings.

### **Key Expert 2: Regional Planner**

S/He will support the team leader in his managerial and technical tasks; develop effective planning and communication procedures; bring together and integrate results from various disciplines; review measures and lessons learnt from other relevant plans; responsible for the development of the climate resilient ICZM plan.

Required qualifications and skills

- University degree in a relevant discipline (Urban Planning, Regional Development, or other related discipline), preferably at PhD level;
- Experience in working with governmental institutions in international projects;
- Experience of at least 10 years with designing/implementing ICZM processes and strategies;

- Fluency in written and spoken English.

Specific assets:

- Knowledge of Arabic is preferable but not mandatory;
- Experience with planning projects in Egypt or in countries with similar conditions and comparable complexities.

### **Key Expert 3: Legal expert/political scientist**

S/He will support the team leader in his managerial and technical tasks; develop effective planning and communication procedures; bring together and integrate results from various disciplines; review measures and lessons learnt from other relevant plans; responsible for legal, institutional and administrative aspects of the ICZM framework.

Required qualifications and skills

- University degree in a relevant discipline (law, social or political sciences or other related discipline), preferably at PhD level;
- Experience in working with governmental institutions in international projects;
- Experience of at least 10 years with studies of public law and governance;
- Fluency in written and spoken English.

Specific assets:

- Knowledge of Arabic is preferable but not mandatory;
- Experience with planning projects in Egypt or in countries with similar conditions and comparable complexities.

### **Key Expert 4: Coastal engineer**

S/He will support the team leader in his managerial and technical tasks; develop effective planning procedures; bring together and integrate results from various disciplines; review measures and lessons learnt from other relevant plans; responsible for the development of the Shoreline Management Plan.

Required qualifications and skills:

- University degree in Civil Engineering or related relevant discipline, preferably at PhD level;
- Experience in working with governmental institutions in international projects;
- Experience of at least 10 years with designing/implementing shoreline management practices and strategies, applying working-with-nature approaches;
- Fluency in written and spoken English.

Specific assets:

- Knowledge of Arabic is preferable but not mandatory;
- Experience with shoreline management projects in Egypt or in countries with similar conditions and comparable complexities.

### **Key Expert 5: Hydrodynamics Modeler**

S/He will support the team leader in his managerial and technical tasks; bring together and integrate results from various disciplines; review measures and lessons learnt from other relevant projects; responsi-

ble for the Vulnerability and Risk Assessment Task and the modelling part of the CMIC.

Required qualifications and skills:

- University degree in Civil Engineering, Oceanography or related relevant discipline, preferably at PhD level;
- Experience in working with governmental institutions in international projects;
- Experience of at least 10 years with development/implementation of water information systems;
- Fluency in written and spoken English.

Specific assets:

- Knowledge of Arabic;
- Experience with monitoring and modelling projects in Egypt or in countries with similar conditions and comparable complexities.

#### **Key Expert 6: Information System specialist**

S/He will support the team leader in his managerial and technical tasks; review measures and lessons learnt from other relevant studies or projects; responsible for development/implementation of technical infrastructure of the Coastal Management and Information Centre.

Required qualifications and skills:

- University degree in Computer Science or related relevant discipline;
- Experience with work and dialogue with governmental institutions in international projects;
- Experience of at least 10 years with development/implementation of water information systems;
- Fluency in written and spoken English.

Specific assets:

- Knowledge of Arabic is preferable but not mandatory;
- Experience with monitoring and modelling projects in Egypt or in countries with similar conditions and comparable complexities.

#### **Key Expert 7: Observation System specialist**

S/He will support the team leader in his managerial and technical tasks; review measures and lessons learnt from other relevant studies or projects; responsible for development/implementation of observation infrastructure (data collection and processing) of the Coastal Management and Information Centre.

Required qualifications and skills:

- University degree in Oceanography, or related relevant discipline;
- Experience with work and dialogue with governmental institutions in international projects;
- Experience of at least 10 years with water observation information systems;
- Fluency in written and spoken English.

Specific assets:

- Knowledge of Arabic is preferable but not mandatory;
- Experience with monitoring and modelling projects in Egypt or in countries with similar conditions and comparable complexities.

The Consultant shall in his application submit the CV's of the Key Experts. The consultant may nominate additional Key Experts that will be employed for the study. The quality of the CV's of the Key Experts will be rated in the accordance with the evaluation criteria specified above.

The Consultant must bring in other experts as required according to the profiles identified in these Terms of Reference. On indicative basis the following experts are likely to be required:

- Environmental expert
- Socio-economic expert
- Agriculture and aquaculture expert
- Hydro geologist
- GIS, and Remote sensing expert
- Water quality expert
- Training and capacity building expert

## **IMPLEMENTATION ARRANGEMENTS:**

### **FACILITIES TO BE PROVIDED BY THE CLIENT**

Office accommodation (two medium sized rooms) might be made available by MWRI at the SPA offices in Cairo for the Team Leader, key Experts and support staff. Therefore, in the financial offer, the Consultant has to include an optional item showing office rental fees in case office accommodation is not provided by MWRI.

### **FACILITIES TO BE PROVIDED BY THE CONSULTANT**

The Consultant will, whether MWRI provides office accommodation or not, be required to make his own arrangements for office furniture and other needed equipment, such as PCs, printers, phone communication, internet access and administrative support. For office accommodation outside of Cairo, it will be the Consultant's responsibility to arrange it.

The office of the Consultant in Cairo must be permanently staffed in order to ensure seamless communication with the Client and other Egyptian stakeholders. The team leader and key experts must be present at this office as often as necessary for effective communication with the Client and other stakeholders during the implementation of the study. The Consultant must ensure that communication with the Client, with Egyptian parties involved in the study and with stakeholders can take place in the Arabic language. The consultant must also ensure that there is sufficient administrative, secretarial and interpreting provision to enable experts to concentrate on their primary responsibilities

## 6. SECTION 6: RETURNABLE BIDDING FORMS / CHECKLIST

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This form serves as a checklist for preparation of your Proposal. Please complete the Returnable Bidding Forms in accordance with the instructions in the forms and return them as part of your Proposal submission. No alteration to format of forms shall be permitted and no substitution shall be accepted. Before submitting your Proposal, please ensure compliance with the Proposal Submission instructions of the BDS 22.

### Technical Proposal Envelope:

<b>Have you duly completed all the Returnable Bidding Forms?</b>	
▪ Form A: Technical Proposal Submission Form	<input type="checkbox"/>
▪ Form B: Bidder Information Form	<input type="checkbox"/>
▪ Form C: Joint Venture/Consortium/ Association Information Form	<input type="checkbox"/>
▪ Form D: Qualification Form	<input type="checkbox"/>
▪ Form E: Format of Technical Proposal	<input type="checkbox"/>
<b>Have you provided the required documents to establish compliance with the evaluation criteria in Section 4?</b>	<input type="checkbox"/>

### Financial Proposal Envelope

(Must be submitted in a separate sealed envelope)

▪ Form F: Financial Proposal Submission Form	<input type="checkbox"/>
▪ Form G: Financial Proposal Form	<input type="checkbox"/>

## FORM A: TECHNICAL PROPOSAL SUBMISSION FORM

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

We, the undersigned, offer to provide the services for [Insert Title of services] in accordance with your Request for Proposal No. [Insert RFP Reference Number] and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal and our Financial Proposal sealed under a separate envelope.

We hereby declare that our firm, its affiliates or subsidiaries or employees, including any JV/Consortium /Association members or subcontractors or suppliers for any part of the contract:

- a) is not under procurement prohibition by the United Nations, including but not limited to prohibitions derived from the Compendium of United Nations Security Council Sanctions Lists;
- b) have not been suspended, debarred, sanctioned or otherwise identified as ineligible by any UN Organization or the World Bank Group or any other international Organization;
- c) have no conflict of interest in accordance with Instruction to Bidders Clause 4;
- d) do not employ, or anticipate employing, any person(s) who is, or has been a UN staff member within the last year, if said UN staff member has or had prior professional dealings with our firm in his/her capacity as UN staff member within the last three years of service with the UN (in accordance with UN post-employment restrictions published in ST/SGB/2006/15);
- e) have not declared bankruptcy, are not involved in bankruptcy or receivership proceedings, and there is no judgment or pending legal action against them that could impair their operations in the foreseeable future;
- f) undertake not to engage in proscribed practices, including but not limited to corruption, fraud, coercion, collusion, obstruction, or any other unethical practice, with the UN or any other party, and to conduct business in a manner that averts any financial, operational, reputational or other undue risk to the UN and we *embrace the principles of the United Nations Supplier Code of Conduct and adhere to the principles of the United Nations Global Compact.*

*We declare that all the information and statements made in this Proposal are true and we accept that any misinterpretation or misrepresentation contained in this Proposal may lead to our disqualification and/or sanctioning by the UNDP.*

*We offer to provide services in conformity with the Bidding documents, including the UNDP General Conditions of Contract and in accordance with the Terms of Reference*

*Our Proposal shall be valid and remain binding upon us for the period of time specified in the Bid Data Sheet.*

We understand and recognize that you are not bound to accept any Proposal you receive.

*I, the undersigned, certify that I am duly authorized by [Insert Name of Bidder] to sign this Proposal and bind it should UNDP accept this Proposal.*

Name: \_\_\_\_\_

Title: \_\_\_\_\_

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

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

*[Stamp with official stamp of the Bidder]*

## FORM B: BIDDER INFORMATION FORM

<b>Legal name of Bidder</b>	[Complete]
<b>Legal address</b>	[Complete]
<b>Year of registration</b>	[Complete]
<b>Bidder's Authorized Representative Information</b>	Name and Title: [Complete] Telephone numbers: [Complete] Email: [Complete]
<b>Are you a UNGM registered vendor?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, [insert UGNM vendor number]
<b>Are you a UNDP vendor?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, [insert UNDP vendor number]
<b>Countries of operation</b>	[Complete]
<b>No. of full-time employees</b>	[Complete]
<b>Quality Assurance Certification (e.g. ISO 9000 or Equivalent) (If yes, provide a Copy of the valid Certificate):</b>	[Complete]
<b>Does your Company hold any accreditation such as ISO 14001 related to the environment? (If yes, provide a Copy of the valid Certificate):</b>	[Complete]
<b>Does your Company have a written Statement of its Environmental Policy? (If yes, provide a Copy)</b>	[Complete]
<b>Contact person UNDP may contact for requests for clarification during Proposal evaluation</b>	Name and Title: [Complete] Telephone numbers: [Complete] Email: [Complete]
<b>Please attach the following documents:</b>	<ul style="list-style-type: none"> <li>▪ Company Profile, which should <u>not</u> exceed fifteen (15) pages, including printed brochures and product catalogues relevant to the goods/services being procured</li> <li>▪ Certificate of Incorporation/ Business Registration</li> <li>▪ Tax Registration/Payment Certificate issued by the Internal Revenue Authority evidencing that the Bidder is updated with its tax payment obligations, or Certificate of Tax exemption, if any such privilege is enjoyed by the Bidder</li> <li>▪ Trade name registration papers, if applicable</li> <li>▪ Local Government permit to locate and operate in assignment location, if applicable</li> <li>▪ Official Letter of Appointment as local representative, if Bidder is submitting a Bid in behalf of an entity located outside the country</li> <li>▪ Power of Attorney</li> </ul>

## FORM C: JOINT VENTURE/CONSORTIUM/ASSOCIATION INFORMATION FORM

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

To be completed and returned with your Proposal if the Proposal is submitted as a Joint Venture/Consortium/Association.

No	Name of Partner and contact information ( <i>address, telephone numbers, fax numbers, e-mail address</i> )	Proposed proportion of responsibilities (in %) and type of services to be performed
1	[Complete]	[Complete]
2	[Complete]	[Complete]
3	[Complete]	[Complete]

<b>Name of leading partner</b> (with authority to bind the JV, Consortium, Association during the RFP process and, in the event a Contract is awarded, during contract execution)	[Complete]
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We have attached a copy of the below document signed by every partner, which details the likely legal structure of and the confirmation of joint and severable liability of the members of the said joint venture:

☐ Letter of intent to form a joint venture      **OR**      ☐ JV/Consortium/Association agreement

We hereby confirm that if the contract is awarded, all parties of the Joint Venture/Consortium/Association shall be jointly and severally liable to UNDP for the fulfillment of the provisions of the Contract.

Name of partner: \_\_\_\_\_ Name of partner: \_\_\_\_\_

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

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

Name of partner: \_\_\_\_\_ Name of partner: \_\_\_\_\_

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

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

## FORM D: QUALIFICATION FORM

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		



If JV/Consortium/Association, to be completed by each partner.

## Historical Contract Non-Performance

☐ Contract non-performance did not occur for the last 3 years

☐ Contract(s) not performed for the last 3 years

Year	Non- performed portion of contract	Contract Identification	Total Contract Amount (current value in US\$)
		Name of Client: Address of Client: Reason(s) for non-performance:	

## Litigation History (including pending litigation)

☐ No litigation history for the last 3 years

☐ Litigation History as indicated below

Year of dispute	Amount in dispute (in US\$)	Contract Identification	Total Contract Amount (current value in US\$)
		Name of Client: Address of Client: Matter in dispute: Party who initiated the dispute: Status of dispute: Party awarded if resolved:	

## Previous Relevant Experience

Please list only previous similar assignments successfully completed in the last 3 years.

List only those assignments for which the Bidder was legally contracted or sub-contracted by the Client as a company or was one of the Consortium/JV partners. Assignments completed by the Bidder's individual experts working privately or through other firms cannot be claimed as the relevant experience of the Bidder, or that of the Bidder's partners or sub-consultants, but can be claimed by the Experts themselves in their CVs. The Bidder should be prepared to substantiate the claimed experience by presenting copies of relevant documents and references if so requested by UNDP.

Project name & Country of Assignment	Client & Reference Contact Details	Contract Value	Period of activity and status	Types of activities undertaken

Bidders may also attach their own Project Data Sheets with more details for assignments above.

☐ Attached are the Statements of Satisfactory Performance from the Top 3 (three) Clients or more.

## Financial Standing

<b>Annual Turnover for the last 3 years</b>	Year	USD
	Year	USD
	Year	USD
<b>Latest Credit Rating (if any), indicate the source</b>		

<b>Financial information</b> (in US\$ equivalent)	<b>Historic information for the last 3 years</b>		
	Year 1	Year 2	Year 3
	<i>Information from Balance Sheet</i>		
Total Assets (TA)			
Total Liabilities (TL)			
Current Assets (CA)			
Current Liabilities (CL)			
	<i>Information from Income Statement</i>		
Total / Gross Revenue (TR)			
Profits Before Taxes (PBT)			
Net Profit			
Current Ratio			

☐ Attached are copies of the audited financial statements (balance sheets, including all related notes, and income statements) for the years required above complying with the following condition:

- a) Must reflect the financial situation of the Bidder or party to a JV, and not sister or parent companies;
- b) Historic financial statements must be audited by a certified public accountant;
- c) Historic financial statements must correspond to accounting periods already completed and audited. No statements for partial periods shall be accepted.

## FORM E: FORMAT OF TECHNICAL PROPOSAL

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

The Bidder's proposal should be organized to follow this format of Technical Proposal. Where the bidder is presented with a requirement or asked to use a specific approach, the bidder must not only state its acceptance, but also describe how it intends to comply with the requirements. Where a descriptive response is requested, failure to provide the same will be viewed as non-responsive.

### SECTION 1: Bidder's qualification, capacity and expertise

- 1.1 Brief description of the organization, including the year and country of incorporation, and types of activities undertaken.
- 1.2 General organizational capability which is likely to affect implementation: management structure, financial stability and project financing capacity, project management controls, extent to which any work would be subcontracted (if so, provide details).
- 1.3 Relevance of specialized knowledge and experience on similar engagements done in the region/country.
- 1.4 Quality assurance procedures and risk mitigation measures.
- 1.5 Organization's commitment to sustainability.

### SECTION 2: Proposed Methodology, Approach and Implementation Plan

This section should demonstrate the bidder's responsiveness to the TOR by identifying the specific components proposed, addressing the requirements, providing a detailed description of the essential performance characteristics proposed and demonstrating how the proposed approach and methodology meets or exceeds the requirements. All important aspects should be addressed in sufficient detail and different components of the project should be adequately weighted relative to one another.

- 2.1 A detailed description of the approach and methodology for how the Bidder will achieve the Terms of Reference of the project, keeping in mind the appropriateness to local conditions and project environment. Details how the different service elements shall be organized, controlled and delivered.
- 2.2 The methodology shall also include details of the Bidder's internal technical and quality assurance review mechanisms.
- 2.3 Explain whether any work would be subcontracted, to whom, how much percentage of the work, the rationale for such, and the roles of the proposed sub-contractors and how everyone will function as a team.
- 2.4 Description of available performance monitoring and evaluation mechanisms and tools; how they shall be adopted and used for a specific requirement.
- 2.5 Implementation plan including a Gantt Chart or Project Schedule indicating the detailed sequence of activities that will be undertaken and their corresponding timing.
- 2.6 Demonstrate how you plan to integrate sustainability measures in the execution of the contract.
- 2.7 Any other comments or information regarding the project approach and methodology that will be adopted.

### SECTION 2A: Bidder's Comments and Suggestions on the Terms of Reference

Provide comments and suggestions on the Terms of Reference, or additional services that will be rendered beyond the requirements of the TOR, if any.

### **SECTION 3: Management Structure and Key Personnel**

- 3.1 Describe the overall management approach toward planning and implementing the project. Include an organization chart for the management of the project describing the relationship of key positions and designations. Provide a spreadsheet to show the activities of each personnel and the time allocated for his/her involvement.
- 3.2 Provide CVs for key personnel that will be provided to support the implementation of this project using the format below. CVs should demonstrate qualifications in areas relevant to the Scope of Services.

### **Format for CV of Proposed Key Personnel**

NAME OF PERSONNEL	[INSERT]
POSITION FOR THIS ASSIGNMENT	[INSERT]
NATIONALITY	[INSERT]
LANGUAGE PROFICIENCY	[INSERT]
EDUCATION/ QUALIFICATIONS	[SUMMARIZE COLLEGE/UNIVERSITY AND OTHER SPECIALIZED EDUCATION OF PERSONNEL MEMBER, GIVING NAMES OF SCHOOLS, DATES ATTENDED, AND DEGREES/QUALIFICATIONS OBTAINED.]

	[INSERT]
PROFESSIONAL CERTIFICATIONS	<p>[PROVIDE DETAILS OF PROFESSIONAL CERTIFICATIONS RELEVANT TO THE SCOPE OF SERVICES]</p> <hr/> <ul style="list-style-type: none"> <li>▪ NAME OF INSTITUTION: [INSERT]</li> <li>▪ DATE OF CERTIFICATION: [INSERT]</li> </ul>
EMPLOYMENT RECORD/ EXPERIENCE	<p>[LIST ALL POSITIONS HELD BY PERSONNEL (STARTING WITH PRESENT POSITION, LIST IN REVERSE ORDER), GIVING DATES, NAMES OF EMPLOYING ORGANIZATION, TITLE OF POSITION HELD AND LOCATION OF EMPLOYMENT. FOR EXPERIENCE IN LAST FIVE YEARS, DETAIL THE TYPE OF ACTIVITIES PERFORMED, DEGREE OF RESPONSIBILITIES, LOCATION OF ASSIGNMENTS AND ANY OTHER INFORMATION OR PROFESSIONAL EXPERIENCE CONSIDERED PERTINENT FOR THIS ASSIGNMENT.]</p> <hr/> <p>[INSERT]</p>

REFERENCES

*[PROVIDE NAMES, ADDRESSES, PHONE AND EMAIL CONTACT INFORMATION FOR TWO (2) REFERENCES]*

REFERENCE 1:

[INSERT]

REFERENCE 2:

[INSERT]

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I, the undersigned, certify that to the best of my knowledge and belief, these data correctly describe my qualifications, my experiences, and other relevant information about myself.

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Signature of Personnel

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Date (Day/Month/Year)



**FORM F: FINANCIAL PROPOSAL SUBMISSION FORM**

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

We, the undersigned, offer to provide the services for [Insert Title of services] in accordance with your Request for Proposal No. [Insert RFP Reference Number] and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal and our Financial Proposal sealed under a separate envelope.

Our attached Financial Proposal is for the sum of [Insert amount in words and figures].

*Our Proposal shall be valid and remain binding upon us for the period of time specified in the Bid Data Sheet.*

We understand you are not bound to accept any Proposal you receive.

Name: \_\_\_\_\_

Title: \_\_\_\_\_

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

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

*[Stamp with official stamp of the Bidder]*

## FORM G: FINANCIAL PROPOSAL FORM

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

The Bidder is required to prepare the Financial Proposal following the below format and submit it in an envelope separate from the Technical Proposal as indicated in the Instruction to Bidders. Any Financial information provided in the Technical Proposal shall lead to Bidder's disqualification.

The Financial Proposal should align with the requirements in the Terms of Reference and the Bidder's Technical Proposal.

**Currency of the proposal:** [Insert Currency]

**Table 1: Summary of Overall Prices**

	Amount(s)
<b>Professional Fees</b> (from Table 2)	
<b>Other Costs</b> (from Table 3)	
<b>Total Amount of Financial Proposal</b>	

**Table 2: Breakdown of Professional Fees**

Name	Position	Fee Rate	No. of Days/ months/ hours	Total Amount
		A	B	C=A+B
In-Country				
Home Based				
<b>Subtotal Professional Fees:</b>				

**Table 3: Breakdown of Other Costs**

Description	UOM	Quantity	Unit Price	Total Amount
International flights	Trip			

Subsistence allowance	Day			
Miscellaneous travel expenses	Trip			
Local transportation costs	Lump Sum			
Out-of-Pocket Expenses				
Other Costs: (please specify)				
<b>Subtotal Other Costs:</b>				

**Table 4: Breakdown of Price per Deliverable/Activity**

<b>Deliverable/ Activity description</b>	<b>Time (person days)</b>	<b>Professional Fees</b>	<b>Other Costs</b>	<b>Total</b>
Deliverable 1				
Deliverable 2				
Deliverable 3				
.....				