



Invitation to Submit an Offer for 19926-2022 – Country Studies on Tax Reforms to Finance Universal Social Protection Systems (6 experts)

The United Nations Development Programme (UNDP) is currently implementing a project **Country Studies on Tax Reforms to Finance Universal Social Protection Systems (6 experts)** that requires the services of an individual to perform the work described in this document.

In consideration of your qualifications, we are hereby inviting you to submit an offer for this particular assignment. To assist you in understanding the requirements of this assignment, we have attached hereto the following :

- The Terms of Reference for the assignment described above - Annex 1;
- The standard Letter of Confirmation of Interest and Availability, - Annex 2 - , which you must accomplish and submit to UNDP; and
- The Individual Contract and its General Terms and Conditions, which you would be expected to sign in the event you are the selected Offeror in this procurement process;
- The Designation of Beneficiary for IC Contract form - Annex 3;
- The Statement of Health for Individual Contractors form - Annex 4;
- Contract for the Services of an Individual Contractor and General Conditions of Contractor - Annex 5;
- The Evaluation Criteria to be considered - Annex 6.

Should you be interested and decide to submit an offer for this assignment, kindly submit directly in the online supplier portal no later than the deadline indicated in the system. If any discrepancy between deadline in the system and in deadline indicated elsewhere, deadline in the system prevails.

We look forward to your favorable response, and thank you in advance for your interest in working with UNDP.

Sincerely,

Procurement Unit

Regional HUB, RBLAC





Tender Overview

The purpose of this consultancy is to engage LAC experts (6 max) in the production of country studies supporting RBLAC and UNDP LAC Country Office's work throughout the region. These country studies are inputs for a regional publication in progress. They are standalone products that may be used to support interactions with governments and will be published in the UNDP LAC Policy Documents series. The consultants will work under the direct guidance of UNDP RBLAC Chief Economist.



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1 Overview

1.1 General Information

Title	Country Studies on Tax Reforms to Finance Universal Social Protection Systems (6
Contact Point	PROCUREMENT UNIT, Regional Hub
Outcome	
E-Mail	procurement.rblac.regionalhub@undp.org
Reference Number	19926-2022
Beneficiary Country	United States
Introduction	Country: Regional Hub - Country: Home-based

Description of the Assignment: Country Studies on Tax Reforms to Finance Universal Social Protection Systems (6 experts)

Period of assignment/services (if applicable): 8 weeks

Proposal should be submitted directly in the portal no later than indicated deadline: 17-August-2022 @ 14:00 (GMT/UCT -4).

Any request for clarification must be sent in writing via messaging functionality in the portal. UNDP will respond in writing including an explanation of the query without identifying the source of inquiry.

1.2 Tender Timeline

Preview Date	
Open Date	02/08/22 20:20 PM
Close Date	17/08/22 20:00 PM
Time Zone	Coordinated Universal Time

1.3 Response Rules

This negotiation is governed by all the rules displayed below.

	Rule
<input type="checkbox"/>	Negotiation is restricted to invited suppliers
<input type="checkbox"/>	Suppliers are allowed to respond to selected lines
<input type="checkbox"/>	Suppliers are allowed to provide multiple responses



	Rule
<input checked="" type="checkbox"/>	Suppliers are allowed to revise their submitted response

1.4 Terms

Negotiation Currency USD ()

1.5 Attachments

File Name or URL	Type	Description
19926-2022 TORs Country Studie	File	
19926-2022 Annex 2.docx	File	
19926-2022 Contract and Genera	File	
19926-2022 Designation of Bene	File	
19926-2022 Evaluation Matrix C	File	
19926-2022 Statement of Healt	File	

2 Requirements

**Response is required*

2.1 Section 1. Overview of the assignment

1. Please read carefully Annex 1 describing main scope of the requirements and other provisions to this process, herewith attached.

Attachments:

File Name or URL	Type	Description
19926-2022 Annex 1 - TORs Country Studie	File	
19926-2022 Annex 2. docx	File	
19926-2022 Annex 3 - Statement of Healt	File	
19926-2022 Annex 4 - Designation of Bene	File	
19926-2022 Annex 5 - Contract and Genera	File	
19926-2022 Annex 6 - Evaluation Matrix C	File	

- *2. Do you confirm acceptance of UNDP General Terms and conditions available at: <http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html> and herewith attached?

Attachments:

File Name or URL	Type	Description
19926-2022 Contract and Genera	File	

3. Individual consultants will be evaluated based on the following methodology:

Cumulative Analysis

When using this weighted scoring method, the award of the contract should be made to the individual consultant whose offer has been evaluated and determined as:

- a) Responsive /compliant /acceptable; and,
- b) Having received the highest score out of a pre-determined set of weighted technical and financial criteria specific to the solicitation.

Technical Proposal (70%)



Only candidates who reach 70% of total score in the Technical evaluation, will be considered RESPONSIVE and will continue for the financial evaluation of proposals.

Financial Proposal (30%)

To be computed as a ratio of the Proposal's offer to the lowest price among the proposals received by UNDP.

Attachments:

File Name or URL	Type	Description
19926-2022 Evaluation Matrix C	File	

2.2 Section 2. Qualifications of the Successful Contractor

*1. Indicate the highest academic qualification that you possess and upload a copy of the certificate.

Academic Background: Advanced university degree (Ph.D or Masters) in economics, applied economics, public policy, or related areas.

Target: Master's Degree

*2. Do you meet the requirement of having 10 years of experience (minimum 5) in applied economic research and consulting.

Target: Yes

*3. Are you proficient in both English and Spanish?

*4. Do you have relevant knowledge and experience of the socioeconomic and political context of the selected country?

Target: Yes

2.3 Section 3. Documents to be included with the proposal;

*1. Upload a brief proposal highlighting:

1. Why you are the most suitable for the job;
2. a Brief methodology on how you will approach and conduct the work (if applicable)

Target: Cover letter provided

*2. Provide detailed breakdown of the financial proposal and submit required financial information directly in the system as applicable.

Attachments:

File Name or URL	Type	Description
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19926-2022 Annex 2. docx	File	
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Target: Details provided

- *3 Provide your personal CV including past experience in similar projects with at least 3 reference contacts (name, title, email address).

Target: CV provided

- *4. Please complete the attached designation of beneficiary for individual contractors.

Attachments:

File Name or URL	Type	Description
19926-2022 Designation of Bene	File	

Target: Designation of beneficiary provided

- *5. Please complete the attached statement of health for individual contractors.

Attachments:

File Name or URL	Type	Description
19926-2022 Statement of Healt	File	

Target: Statement of health provided

2.4 Section 4. Evaluation

1.

Individual consultants will be evaluated based on the following methodologies:

2. Cumulative analysis

When using this weighted scoring method, the award of the contract should be made to the individual consultant whose offer has been evaluated and determined as:

a) responsive/compliant/acceptable, and

b) Having received the highest score out of a pre-determined set of weighted technical and financial criteria specific to the solicitation.

* Technical Criteria weight; [70%]



* Financial Criteria weight; [30%]

Only candidates obtaining a minimum of 70% point would be considered for the Financial Evaluation.

***2. Evaluation criteria - A. Academic Background**

- Ph. D. degree in economics, applied economics, public policy or related areas..... 20 points
- Master's degree in economics, applied economics, public policy, or related areas..... 15 points

Response attachments are optional.

***3. Evaluation criteria - B. General Experience**

10 years of experience (minimum 5) in applied economic research and consulting.

- No previous experience 0 points
- 5-7 years of experience 5 points
- 7-9 years of experience 10 points
- 10 years of experience 20 points

Attachments:

File Name or URL	Type	Description
19926-2022 Evaluation Matrix C	File	

Response attachments are optional.

***4. Evaluation criteria - C. Specific Experience**

Relevant knowledge and experience of the socioeconomic and political context of the selected country.

Attachments:

File Name or URL	Type	Description
19926-2022 Evaluation Matrix C	File	

***5. Evaluation criteria - D. Required Languages**

Required Languages: English or Spanish are required.

- English and Spanish 20
- Only English or Spanish..... 15

Attachments:

File Name or URL	Type	Description
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19926-2022 Evaluation Matrix C	File	
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*6. Evaluation criteria - E. Assessment

Assessment of quality of annotated outline submitted by the SDG and Development Policy Unit.

Attachments:

File Name or URL	Type	Description
19926-2022 Evaluation Matrix C	File	

I-1. Overall technical evaluation

[this is an internal criteria to be used by evaluation team. Total the score from each of the evaluation criteria above and put as a score. select knock out score, typically 70 out of 100]

2.5 Section 5. Offer form

*1. Offeror's Declaration

I hereby declare that:

- I have read, understood and hereby accept the Terms of Reference describing the duties and responsibilities of this assignment;
- I have also read, understood and hereby accept UNDP's General Conditions of Contract for the Services of the Individual Contractors;
- I hereby propose my services and I confirm my interest in performing the assignment through the submission of my CV which I have duly signed and attached hereto;
- In compliance with the requirements of the Terms of Reference, I hereby confirm that I am available for the entire duration of the assignment, and I shall perform the services in the manner described in my proposed approach/methodology which I have attached hereto (if applicable)

Target: I confirm I understand and accept the above statement

*2. Payment Type and Rates

I hereby propose to complete the services based on the following payment rate:

(Please select the applicable option)

Attachments:

File Name or URL	Type	Description
19926-2022 Annex 2. docx	File	

Target: A total lump sum payable in the manner described in ToR

*3. Payment Certification Procedures



I recognize that the payment of the abovementioned amounts due to me shall be based on my delivery of outputs within the timeframe specified in the TOR, which shall be subject to UNDP's review, acceptance and payment certification procedures.

*4. Please confirm your offer remains valid for a total of [minimum 90 days] after the submission deadline.

Target: I confirm offer validity as required

***5. Contract Type**

Select the contract type that you will sign if selected, from the two options below:

1. Sign an Individual Contract with UNDP;
2. Request my employer to sign with UNDP a Reimbursable Loan Agreement (RLA) for and on my behalf. Provide contact persons and details of employer in the comments box or as an attachment.

***6. Other Engagements**

Please indicate whether you have any other engagements at the time of submission. If yes, provide details using the template attached

Attachments:

File Name or URL	Type	Description
Template for IC declaring other	File	

***7. Acceptance and cost for the proposal**

I fully understand and recognize that UNDP is not bound to accept this proposal, and I also understand and accept that I shall bear all costs associated with its preparation and submission and that UNDP will in no case be responsible or liable for those costs, regardless of the conduct or outcome of the selection process.

*8. I also fully understand that, if I am engaged as an Individual Contractor, I have no expectations nor entitlements whatsoever to be re-instated or re-employed as a staff member

***9. Former UN Staff Member**

If you are a former staff member of the United Nations recently separated, please confirm hereby that you have complied with the minimum break in service required before you can be eligible for an Individual Contract.

***10. Relatives employed with UN**

Please confirm that you have no first degree relative (mother, father, son, daughter, spouse/partner, brother or sister) currently employed with any UN Agency or office.

If such relationship exist, please disclose the name of the relative, the UN office employing the relative, and the relationship. Use the comments box or add an attachment if necessary.

***11. Relatives employed by UN or other Organizations**

Are any of your relatives employed by UNDP, or any other UN organization or any other public international organization?

Attachments:

File Name or URL	Type	Description
Template for IC to declare rel	File	

***12. Enquiries with present employer**

Do you have any objections to us making inquiries of your present employer?

***13. REFERENCES**

List three persons not related to you who are familiar with your character and qualifications. Use template attached and upload.

Attachments:

File Name or URL	Type	Description
Template for IC to provide ref	File	

Target: I have listed 3 references attached

*14. Are you now or have you ever been a permanent civil servant in your government's employee? If yes, indicate when in the comments box

***15. Criminal Records**

Have you been arrested, indicted, or summoned into court as a defendant in a criminal proceeding, or convicted, fined or imprisoned for the violation of any law (excluding minor traffic violations)? If yes, give full particulars of each case in an attached statement.

***16. Statement of Health**

The selected contractor will be required to provide proof of insurance coverage as stated in the Statement of Health herewith attached prior to contract signature.

Attachments:

File Name or URL	Type	Description
Individual Contract_Statement	File	Template for statement of health

Target: I will be able to provide proof of medical insurance coverage if selected

*17.

Conflict of Interest

Consistent with the overall principle of fairness and impartiality in the conduct of UNDP Procurement, individual contractors who have been involved in the preparation or formulation of a project or any project implementation activity that leads to subsequent services, including but not limited to the writing of Terms of References for services leading to the engagement of Individual Contractor, should be disqualified from the selection process for IC services arising from such work, in order to prevent situations of conflict of interest.



In the same manner, an individual contractor must neither be involved in the evaluation or assessment of a project or a project activity, if the same individual was involved in any aspects of its formulation or implementation.

Please disclose if you have been involved in any of the manners described above.

*18. I certify that the statements made by me in answer to the foregoing questions are true, complete and correct to the best of my knowledge and belief. I understand that any misrepresentation or material omission made on a Personal History form or other document requested by the Organization may result in the termination of the service contract or special services agreement without notice.

NB. You will be requested to supply documentary evidence which support the statements you have made above. Do not, however, send any documentary evidence until you have been asked to do so and, in any event, do not submit the original texts of references or testimonials unless they have been obtained for the sole use of UNDP.

2.6 Section 6. Annexes and attachments

***1. CV and other documents**

Have you uploaded your CV including education/qualifications, professional certifications, and employment records/experience?

*2. Have you provided a brief description of the approach to work?

*3. Have you provided breakdown of costs supporting the all inclusive financial proposal.

Please ensure there are no mathematical errors and that amounts match with your offer in the system

Attachments:

File Name or URL	Type	Description
Template for IC to provide bre	File	

2.7 Section I-1.

I-1. Total Amount from the Supplier's Response.



3 Lines

Instructions Please add the price for each deliverable listed below. Upload breakdown of financial proposal using template provided. make sure that the total in the breakdown matches with total of deliverables in the system.

3.1 Line Information

Line	Category Name	Item	UOM	Estimated Quantity	Unit Price	Total Price	Additional Attributes
1-Deliverable 1: First draft of the country study on analyzing the tax systems of the selected country.	80101601						
2-Deliverable 2: Final draft of the country study on analyzing the tax systems of the selected country.	80101601						