



REQUEST FOR PROPOSAL (RFP)
Services of a Local Firm for Institutional Strengthening and Mainstreaming
(Energy Planning, Project packaging and Local RE Policy Making)

	DATE: August 4, 2020
	REFERENCE: RFP-050-PHL-2020

Dear Sir / Madam:

We kindly request you to submit your Proposal for the services of a firm for the Institutional Strengthening and Mainstreaming (Energy Planning, Project packaging and Local Renewable Energy Policy Making).

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

Proposals may be submitted on or before **Tuesday, August 18, 2020** and via email

Email address: bids.ph@undp.org

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

In the course of preparing your Proposal, it shall remain your responsibility to ensure that it reaches the address above on or before the deadline. Proposals that are received by UNDP after the deadline indicated above, for whatever reason, shall not be considered for evaluation. If you are submitting your Proposal by email, kindly ensure that they are signed and in the .pdf format, and free from any virus or corrupted files.

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

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

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

No price variation due to escalation, inflation, fluctuation in exchange rates, or any other market factors shall be accepted by UNDP after it has received the Proposal. At the time of Award of Contract or Purchase Order, UNDP reserves the right to vary (increase or decrease) the quantity of services and/or goods,

by up to a maximum twenty five per cent (25%) of the total offer, without any change in the unit price or other terms and conditions.

Any Contract or Purchase Order that will be issued as a result of this RFP shall be subject to the General Terms and Conditions attached hereto. The mere act of submission of a Proposal implies that the Service Provider accepts without question the General Terms and Conditions of UNDP, herein attached as Annex 3.

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

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

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

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

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

Thank you and we look forward to receiving your Proposal.

Sincerely yours,

Alka Aneja
Procurement Team Leader
8/4/2020

Description of Requirements

Context of the Requirement	Institutional Strengthening and Mainstreaming (Energy Planning, Project packaging and Local Renewable Energy (RE) Policy Making)
Implementing Partner of UNDP	Department of Energy
Brief Description of the Required Services	Details as per the Terms of Reference (ToR)
List and Description of Expected Outputs to be Delivered	Details as per the Terms of Reference (ToR)
Person to Supervise the Work/Performance of the Service Provider	The work of the Firm will be supervised by a focal person from the project management unit of Development for Renewable Energy Applications Mainstreaming and Market Sustainability (DREAMS) Project , and coordinated by a focal person to be assigned by the Iloilo provincial government and the DREAMS focal persons.
Frequency of Reporting	<i>as required, per TOR</i>
Progress Reporting Requirements	<i>as required, per TOR</i>
Location of work	<input checked="" type="checkbox"/> Iloilo Provincial Capitol
Target start date	15 September 2020
Latest completion date	30 November 2020
Travels Expected	It is expected that the selected firm should have a base in the Iloilo Provincial Capitol and should report to PPDO based on the service level agreement in Section K. The Firm may be requested to report to the VFO in Cebu City and the DOE-DREAMS office in Taguig City, Metro Manila. The DREAMS project will shoulder the cost of the scheduled trips outside Iloilo province subject to prior approval.
Facilities to be Provided by UNDP (i.e., must be excluded from Price Proposal)	<input checked="" type="checkbox"/> None.
Implementation Schedule indicating breakdown and	<input checked="" type="checkbox"/> Required

timing of activities/sub-activities																									
Names and curriculum vitae of individuals who will be involved in completing the services	<input checked="" type="checkbox"/> Required.																								
Currency of Proposal	<input checked="" type="checkbox"/> Local Currency: Philippine Peso																								
Value Added Tax on Price Proposal	<input checked="" type="checkbox"/> must be exclusive of VAT and other applicable indirect taxes																								
Validity Period of Proposals (<i>Counting for the last day of submission of quotes</i>)	<input checked="" type="checkbox"/> 120 days In exceptional circumstances, UNDP may request the Proposer to extend the validity of the Proposal beyond what has been initially indicated in this RFP. The Proposal shall then confirm the extension in writing, without any modification whatsoever on the Proposal.																								
Partial Quotes	<input checked="" type="checkbox"/> Not permitted																								
Payment Terms	<div>The selected service provider shall be remunerated based on the following schedule of payment:</div> <table><tr><th>Deliverables/ Outputs</th><th>Target Due Dates</th><th>Private Firm</th><th>Non- Profit Org</th></tr><tr><td>Approved Inception Plan</td><td>Within 15 calendar days from contract signing</td><td>10%</td><td>20%</td></tr><tr><td>Accepted Output 1: Draft Provincial RE Plan</td><td>September 15</td><td>20%</td><td>25%</td></tr><tr><td>Accepted Output 2: Three (3) Draft Project Proposals</td><td>September 30</td><td>20%</td><td>30%</td></tr><tr><td>Accepted Output 3: Final Provincial RE Plan and Final Proposals for SF4RE</td><td>October 30</td><td>20%</td><td>15%</td></tr><tr><td>Accepted Output 4: Process Document for Provincial RE planning and Indicative Inception plan for the Implementation of the Approved SF4RE proposal if any; if none is approved or proposed for SF4RE funding, actual submission and receipt of the proposals</td><td>November 30</td><td>30%</td><td>20%</td></tr></table>	Deliverables/ Outputs	Target Due Dates	Private Firm	Non- Profit Org	Approved Inception Plan	Within 15 calendar days from contract signing	10%	20%	Accepted Output 1: Draft Provincial RE Plan	September 15	20%	25%	Accepted Output 2: Three (3) Draft Project Proposals	September 30	20%	30%	Accepted Output 3: Final Provincial RE Plan and Final Proposals for SF4RE	October 30	20%	15%	Accepted Output 4: Process Document for Provincial RE planning and Indicative Inception plan for the Implementation of the Approved SF4RE proposal if any; if none is approved or proposed for SF4RE funding, actual submission and receipt of the proposals	November 30	30%	20%
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	to the agencies proposed by the Client				
Person(s) to review/inspect/ approve outputs/completed services and authorize the disbursement of payment	National Project Director and Focal Person of the PGI upon recommendation of the PMU				
Criteria for Contract Award	<input checked="" type="checkbox"/> Highest Combined Score (based on the 70% technical offer and 30% price weight distribution), where 700 points is the minimum passing score for the Technical Proposal. <input checked="" type="checkbox"/> Full acceptance of the UNDP Contract General Terms and Conditions (GTC). This is a mandatory criterion and cannot be deleted regardless of the nature of services required. Non- acceptance of the GTC may be grounds for the rejection of the Proposal.				
Criteria for the Assessment of Proposal	<u>Technical Proposal (70%) – as detailed in the Terms of Reference</u> <u>Financial Proposal (30%)</u> To be computed as a ratio of the Proposal's offer to the lowest price among the proposals received by UNDP.				
UNDP will award the contract to:	<input checked="" type="checkbox"/> One and only one Local Firm				
Type of Contract to be Signed	<input checked="" type="checkbox"/> Contract Face Sheet (Goods and-or Services) UNDP				
Contract General Terms and Conditions ¹	<input checked="" type="checkbox"/> General Terms and Conditions for de minimi contracts Applicable Terms and Conditions are available at: http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html				
Annexes to this RFP	<input checked="" type="checkbox"/> Form for Submission of Proposal (Annex 2) <input checked="" type="checkbox"/> Detailed TOR (Annex 3) <input checked="" type="checkbox"/> Others Annex 4 – Previous Relevant Experience/Track record Annex 5 – Format for CV of Proposed Key Resources Annex 6 – Financial Proposal Template Annex 7 – Vendor Form				

¹ Service Providers are alerted that non-acceptance of the terms of the General Terms and Conditions (GTC) may be grounds for disqualification from this procurement process.

<p>Contact Person for Inquiries (Written inquiries only)</p>	<p>[Name] : Joseph Pangilinan [Designation] : Procurement Assistant + Mobile : +639177961975 [Email] : procurement.ph@undp.org</p> <p>Any delay in UNDP's response shall be not used as a reason for extending the deadline for submission, unless UNDP determines that such an extension is necessary and communicates a new deadline to the Proposers.</p>
<p>Eligibility</p>	<p>As part of eligibility review, kindly upload the following documents in the e-tendering site:</p> <ul style="list-style-type: none"> • Company Profile • Valid Business Licenses – Registration Papers, Tax Payment Certification, etc • Latest Audited Financial Statements from 2018 and 2019 – income statement and balance sheet to indicate Its financial stability, liquidity, credit standing, and market reputation, etc. • Track Record – list of clients for similar services as those required by UNDP, indicating description of contract scope, contract duration, contract value, contact references • Certificates and Accreditation – including Quality Certificates, Patent Registrations, Environmental Sustainability Certificates, etc, if any • Written Self-Declaration that the company is not in the UN Security Council 1267/1989 List, UN Procurement Division List or Other UN Ineligibility List

FORM FOR SUBMITTING SERVICE PROVIDER'S PROPOSAL²

(This Form must be submitted only using the Service Provider's Official Letterhead/Stationery³)

[insert: Location].

[insert: Date]

To: [insert: Name and Address of UNDP focal point]

Dear Sir/Madam:

We, the undersigned, hereby offer to render the following services to UNDP in conformity with the requirements defined in the RFP dated [specify date] , and all of its attachments, as well as the provisions of the UNDP General Contract Terms and Conditions:

A. Qualifications of the Service Provider

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

- a) Profile – describing the nature of business, field of expertise, licenses, certifications, accreditations;*
- b) Business Licenses – Registration Papers, Tax Payment Certification, etc.*
- c) Latest Audited Financial Statement – income statement and balance sheet for the year 2018 and 2019 to indicate its financial stability, liquidity, credit standing, and market reputation, etc. ;*
- d) Track Record – list of clients for similar services as those required by UNDP, indicating description of contract scope, contract duration, contract value, contract references;*
- e) Certificates and Accreditation – including Quality Certificates, Patent Registrations, Environmental Sustainability Certificates, etc.*
- f) Written Self-Declaration that the company is not in the UN Security Council 1267/1989 List, UN Procurement Division List or Other UN Ineligibility List.*
- g) Letter of Satisfactory Completion from at least three (3) client of projects mentioned in Annex 4*

B. Proposed Methodology for the Completion of Services

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

² This serves as a guide to the Service Provider in preparing the Proposal.

³ Official Letterhead/Stationery must indicate contact details – addresses, email, phone and fax numbers – for verification purposes

An Incisive Analysis is required with maximum of 1500 words including tables, figures; but pictures are not encouraged. The analysis must describe of the energy situation, challenges and potentials in the development of RE sources in Iloilo, and how the outputs from the project will help address the challenges mentioned and contribute to the Philippine Energy Plan and RE Law.

C. Qualifications of Key Personnel

, the Service Provider must provide:

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

D. Cost Breakdown per Deliverable* - Please use Annex 6 template

TERMS OF REFERENCE

A. Background

The Development for Renewable Energy Applications Mainstreaming and Market Sustainability (DREAMS) Project is a five-year project being implemented by the Department of Energy (DOE) through its Renewable Energy Management Bureau (REMB) in partnership with the Global Environment Facility (GEF) and the United Nations Development Programme (UNDP).

The objective of the DREAMS Project is to reduce GHG emissions through the promotion and facilitation of the commercialization of renewable energy (RE) markets through the removal of barriers to increase investments in RE-based power generation projects. This will be achieved through (1) enforcement of a supportive policy and regulatory environment for leveraging investment in RE development and applications at the local level, (2) strengthened institutional capacity that leads to increased RE investment at the local level, (3) capitalized RE market to increased share of RE-based power capacity, and (4) RE commercialization to increase confidence of local RE developers that leads to an enhanced uptake of RE projects and successful replication using proven and emerging RE technologies.

The project assists Local Government Units (LGUs), Electric Cooperatives (ECs), National Power Corporation-Small Power Utilities Group (NPC-SPUG), Qualified Third Parties (QTPs), New Power Producers (NPPs) and Barangay Power Associations (BAPAs) through the Localized RE Planning Capacity Building Program of the project to promote and increase RE investments at the local level. The assistance given to these partners are in the form of trainings and technical assistance to promote, develop, implement and manage RE projects at the local level.

The DREAMS project has a Support Fund for RE (SF4RE) that can be accessed by LGUs, ECs, NPC-SPUG, QTPs, NPPs, BAPAs and RE developers to leverage investments for their RE projects that will lead towards an increase in RE based installed capacity. The SF4RE provides a financing mechanism to enhance or leverage local RE investments. The DREAMS project will provide technical assistance to LGUs and smaller RE proponents for them to be able to access the SF4RE and other financing instruments.

B. Stakeholders of the Project

The project will be implemented together with the Provincial Government of Iloilo (PGI). Under the guidance of the Office of the Governor, the Provincial Planning and Development Office (PPDO) of Iloilo will be the key focal office at the province level. Other local stakeholders include the DOE Visayas Field Office (VFO), Electric Cooperatives (ECs) of Iloilo Province (ILECO 1,2,3), Renewable Energy (RE) Developers and other RE stakeholders operating in the area.

The REMB as the implementing unit of the DREAMS project shall maintain overall coordination through the DREAMS Project Management Unit (PMU).

C. Objective

The required service relates to Component 2 (Institutional Strengthening for RE Mainstreaming) of the DREAMS project.

A Firm⁴ is needed to capacitate and assist the PPDO in preparing a Provincial RE Plan. The plan will have the following minimum content and features:

- i. Energy Resource Assessment
- ii. Contain power and non-power⁵ RE investment portfolios, policies, programs and plans.
- iii. Harmonized with the executive and legislative agenda of the province, by incorporating the said plans into their provincial development plans (e.g. Provincial Development and Physical Framework Plan).⁶
- iv. Will provide information to attract RE investors and developers to build RE plants within the province, to ensure access to reliable and clean energy resources for the entire province.
- v. A portfolio of potential RE projects in specific locations
- vi. Three detailed proposal to be submitted to access support from the SF4RE and other financing facilities from other institutions
- vii. A Process documentation that will share lessons in Energy Planning to other Provinces.

As a capacity building activity for the Provincial Government, the Firm must directly involve and capacitate the PPDO and other relevant Provincial Government staff in the process of producing the Iloilo Province RE Plan and Project Proposals that will emanate from the plan. In addition, the Firm must assist and capacitate the PGI to communicate the findings to legislators, executives and interested investors in the province.

This means that final output will be an output of the PGI and not of the contracting organization

D. Scope of Work and Methodology of the Required Services

The Local Consultant Firm (LCF of Firm) is expected to train, guide and capacitate the PPDO and other relevant staff in the Provincial Government to study available energy data from relevant agencies (e.g. DOE, NEA and ECs) and if needed, gather primary and secondary data by conducting desk research, site visits, key informant interviews and focused group discussions (as necessary) with the key stakeholders to be able to produce an Iloilo Provincial RE Plan containing the following:

- ☐ A pre-assessment study on the readiness of the existing transmission network (grid) with respect to its capability to accommodate new RE facilities (conventional and variable RE).⁷
- ☐ As assessment on the readiness of the ECs (ILECO 1, 2 and 3), taking into consideration the existing Power Supply Agreements (PSAs) of the ECs.

⁴The term “firm” in this document refers to private for-profit or non-profit organizations

⁵This refers to utilizing renewable energy for productive uses. For instance, installation of solar streetlights, solar water pumps, non-power applications of geothermal energy, etc.

⁶The Specialist shall ensure that the Provincial Government complies with the guidelines of the JMC between DILG and DOE on the *Guidelines for LGUs to Facilitate the Implementation of Energy Projects*, if this is issued during the contract duration of the Specialist.

⁷ This is just a pre-assessment study. A full-blown and in-depth Grid Impact Study (GIS) and Distribution Impact Study (DIS) shall be required from prospective RE Developers.

- A criteria which shall be used as a basis for the identification and profiling of priority RE sites for both power and non-power projects.
- Provincial RE Investment Plan to include a list of potential RE Projects based on the criteria that will be developed and agreed by the PPDO. The list of RE Projects should include at the minimum:
 - Beneficiaries and/or market
 - Available RE resources and capacity
 - RE technology to be applied
 - Project technical specifications
 - Estimated project financial requirement
 - Potential source of funding
 - Expected benefits/ revenues/ cash flow from the project(s)
- Policies and/or programs that the PPDO will propose to the legislators and executives of the Provincial Government to support the RE Plan

The Firm must assist the province in identifying and formalizing RE investment areas for power and non-power uses. Existing studies and energy plans (such as the Competitive Renewable Energy Zones (CREZ) study, the University of the Philippines' Phil-LiDAR 2 Program, and Distribution Development Plans (DDP) of various ECs), will be used by the Firm and PPDO to determine key areas for RE investments. In addition, the Iloilo Provincial and Municipal Annual Investment Plans and Comprehensive Land Use Plans will also serve as references to determine the appropriate RE policies and programs to be implemented by the Provincial Government. The Firm may also capacitate the PPDO to conduct RE resource assessments through field visits, if necessary.

The firm should be able to use software for energy modeling, supply and demand simulation, renewable energy system design, and geographic information system (GIS) to process data that would be used for the outputs.

The firm is required to come up with three concrete project proposals for the Support Facility for Renewable Energy Fund (SF4RE), which is being implemented by the DREAMS project. The Firm should collect available data from the PPDO for the project proposals, and should also conduct site visits, if necessary, to create a detailed engineering design for the specific project proposals. The Firm must assist the PPDO in filling up the SF4RE Proposal Template, if necessary.

Coordination with ECs and DOE to consolidate existing data on RE resource assessment with the Provincial Government's data will be a significant task of the Firm. The Firm must also document the process of working with the provincial government, to create a Process Document that will guide other provincial governments to replicate the initiative of incorporating RE planning into provincial development plans.

E. Expected Outputs and Deliverables

The Firm in close coordination with the DREAMS PMU and PPDO shall facilitate the preparation of an inception plan with a detailed work breakdown structure to produce the outputs below.

The Firm is expected to submit three outputs namely:

1) An **Iloilo Provincial RE Plan** which will contain a pre-assessment of the transmission and distribution grids, capacity assessment of ILECO 1,2,3, Provincial RE Investment Plan, proposals for policies and/or programs to be proposed by the PPDO to the Provincial Government to implement the RE Plan, and other elements which will be determined during inception planning.

2) **Three (3) Project Proposals** which will contain details about the chosen projects of the Provincial Government of Iloilo that will seek funding from the DREAMS SF4RE, or other financing windows from the government or private investors or donor institutions or inclusion in the PGIs comprehensive development plan.

3) **Process Document** that will guide other Local Government Units to replicate the initiative of incorporating RE planning into their development plans. In order to provide proper guidance in the Process Document, the Firm must be actively involved in the process of proposing the RE investment plan or program to the provincial legislators, executives, and other offices as may be agreed upon.

The Firm shall provide the digital copy of all data/output generated (like shapefiles and its metadata) to the Iloilo Provincial Government thru the PPDO and DREAMS PMU. This will be used for baseline reference and updating of plans in the future.

Deliverables/ Outputs	Estimated days to Complete	Target Due Dates	Review and Approvals Required (<i>review output and confirm acceptance</i>)
Approved Inception Plan that will include at the minimum a) Work breakdown structure including work methodologies b) Final team composition with detailed CV and TOR of each hired member c) Outline of the Contents of the Provincial RE Plan d) Format of the Reports for Service Level Agreements	5	Within 15 calendar days from contract signing	National Project Director and Focal Person of the PGI upon recommendation of the PMU
Accepted Output 1: Draft Provincial RE Plan	30	September 15	
Accepted Output 2: Three (3) Draft Project Proposals	15	September 30	
Accepted Output 3: Final Provincial RE Plan and Final proposals	20	October 30	

Deliverables/ Outputs	Estimated days to Complete	Target Due Dates	Review and Approvals Required (<i>review output and confirm acceptance</i>)
Accepted Output 4: Process Document for Provincial RE planning	10	November 30	

F. Institutional Arrangement/Governance and Accountability

A Local Project Team shall be formed during the Inception Planning. At the minimum, it shall be composed of the Focal Person from PGI and the Contractor's Team Leader (on-site) and a member from the DREAMS Project Management Unit.

The work of the Firm will be supervised by a focal person from the DREAMS PMU, and coordinated by a focal person to be assigned by the Iloilo provincial government and the DREAMS focal persons. The Iloilo provincial government will, subject to availability of space, provide a working area to the Firm during its staff's consultations with concerned units of the LGU. The deliverables of the Firm should be approved by both the Iloilo provincial government and DREAMS PMU.

The communication, gathering and consolidation of data for the studies, within or outside of the Iloilo Provincial Capitol shall be the responsibility of the Firm. However, the Provincial Government of Iloilo may aid the Firm in arranging and executing field visits within Iloilo Province.

The Firm, as maybe be required in the inception plan will coordinate with divisions under the DOE Renewable Energy Management Bureau (REMB), the DOE VFO, DUs and LGUs within Iloilo province .

G. Duration of the Work

The contract period is will be from 15th September to 30th November 2020.

H. Facilities to be provided by the Project

The Firm is expected to have a base / office in the Iloilo Provincial Capitol and should report to PPDO based on the service level agreement in Section K. The Firm may be requested to report to the VFO in Cebu City and the DOE-DREAMS office in Taguig City, Metro Manila. The DREAMS project will shoulder the cost of the Firm for scheduled trips outside Iloilo province subject to prior approval.

In light of the COVID-19 pandemic and declaration of State of Public Health Emergency in the Philippines, all work of the FIRM shall be done within the guidelines and protocols set by the local government.

I. Professional Qualifications of the Successful Firm Contractor and its key personnel

The Consultancy Firm have at least 5 years of accumulated experience in assisting LGUs in any of the following: preparation of plans, training, feasibility studies, preferably in energy or economic development plans, policies and programs.

The firm is required to form a Project Team that will be assigned for this contract. The Project Coordinator SHOULD be a permanent employee of the Firm and belong to a Top Management Position to represent and make decisions for the organization. The Duty Station of the Team Leader should be in Iloilo.

J. Scope of Price Proposal and Schedule of Payments

This is a lump-sum approach. The lump sum amount must be “all inclusive” of expenses, e.g. supplies, reproduction, meals, lodging, and other local travel fares.⁸

The Firm is expected to conduct at least 6 field visits within Iloilo Province during the study period. These field visits will include visits to the proposed projects areas. The fare, lodging and meals during visits at the DOE office for presentation or consultation, if requested, will be paid for by the DREAMS PMU.

The contract price is fixed regardless of changes in cost components.

Deliverables/ Outputs	Payment Tranche:	
	For Private Firm	For Nonprofit
Approved Inception Plan	10%	20%
Accepted Output 1: Draft Provincial RE Plan	20%	25%
Accepted Output 2: Three (3) Draft Project Proposals	20%	30%
Accepted Output 3: Final Provincial RE Plan and Final Proposals for SF4RE	20%	15%

⁸The term “All inclusive” implies that all costs (professional fees, travel costs, living allowances, communications, consumables, etc.) that could possibly be incurred by the Contractor are already factored into the final amounts submitted in the proposal

Deliverables/ Outputs	Payment Tranche:	
	For Private Firm	For Nonprofit
Accepted Output 4: Process Document for Provincial RE planning and Indicative Inception plan for the Implementation of the Approved SF4RE proposal if any; if none is approved or proposed for SF4RE funding, actual submission and receipt of the proposals to the agencies proposed by the Client	30%	20%

K. Key Performance Indicators and Service Level

Key services required	Frequency	Minimum standard/requirement
Regular Project Meeting of Local Project Team(Based in Iloilo)	weekly	Minutes of meeting signed by PGI Focal person
Status report based on Inception plan or work breakdown structure	every after 15 working days	Based on agreed upon format during the inception planning Copy furnished PGI
Project Management Report	every end of the month	Approved by the focal person of the PGI for this project Signed Minutes of Meeting (if any) that happened during the period being covered by the report
Completion Report	end of the project	Clearance from PGI that Firm has no further commitment or pending issues with the PGI Checklist of all soft copies of documents and reports submitted to DREAMS PMU and PPDO-Iloilo duly validated by both agencies.

Non submission of these documents (either in hard or soft copies) will lead to deferment of payments due to the Firm. For purposes of documentation, soft copies of the reports are acceptable but duly signed hard copies of the reports must be submitted as part of the final requirement for final payment.

L. Criteria for Selection of the Best Offer

The Combined Scoring Method, using a 70%-30% distribution for technical and financial proposals, respectively, will be implemented. The minimum passing score of the technical proposal is 70%. The evaluation of the Technical Proposal will comprise the 3 major criteria as shown in the table below.

Technical Proposal Evaluation Criteria		Points Obtainable
1.	Bidder's qualification, capacity and experience / Expertise of the Firm	300
2.	Proposed Methodology, Approach and Implementation Plan	400
3.	Management Structure and Key Personnel	300
	Total	1000

Section 1. Bidder's qualification, capacity and experience		Points obtainable
1.1	Track Record: Bidder has minimum 5 years of accumulated experience in assisting LGUs in any of the following: preparation of plans, training, feasibility studies, preferably in energy or economic development plans, policies and programs. See section L on type of evidence needed <ul style="list-style-type: none"> • 5 years 140 points • Additional 10 points per additional year, maximum of 200 points 	200
1.2	Bidder's local presence <ul style="list-style-type: none"> • has a local office, or project management unit in Iloilo or existing management partnership with an organization in Iloilo Province (specify name of organizations, years working as partners and purpose/s of partnership = 100points • to be established if selected = 70 points 	100
Total Section 1		300

Section 2. Proposed Methodology, Approach and Implementation Plan		Points obtainable
2.1	Understanding of the requirement of the TOR as evidenced (see Section on L)- <ul style="list-style-type: none"> • Analysis fully captures the intent of the TOR= 140 • Analysis partially captures the intent of TOR = 100 • Additional points for creative presentation of data = maximum of 60 points 	200

2.3	<p>Assessment of the implementation plan:</p> <ul style="list-style-type: none"> a) Activities are properly sequenced based on TOR b) Time frame is realistic c) considered risks and risk management strategies d) Activities will result to valuable participation of clients (Provincial and local level) <ul style="list-style-type: none"> • for each indicator = 50 points: • criteria fully satisfied = 50; • partially - 35points; • plan is not satisfactory, may lead to delays or fail to deliver the outputs on time = 0 	200
Total Section 2		400

A detailed CV of all Team members using Annex 5 template shall be submitted and shall reflect and show evidence of the criteria set below

Section 3. Project Team Composition			Points obtainable
3.1	<p>Team Project Coordinator: minimum a Senior Level Executive or Officer with permanent item/regular employee (Division/Unit Head; Manager or equivalent position) of the firm for a minimum of 3 years</p> <ul style="list-style-type: none"> • minimum = 70 points • additional 10 points for each additional year of employment, maximum of 100 points • if not senior level and permanent = 0 points regardless of years in service 		100
3.2	Qualifications of Required Key Team members		
3.2 a	Team Leader		100
	<p>Educational Background: minimum MA/MS graduate in economics, engineering, business, environmental science, urban/rural planning, public administration, Law Degree Holder or BS Engineering graduate</p> <ul style="list-style-type: none"> • minimum = 14points • additional 6 points if licensed engineer, bar passer or PhD holder or completion of a second MA/MS/PhD degree (attached proof) • additional 3 points for each energy and /or planning related Training/Course Certificates (show proof) 	20	
	<p>Experience:</p> <ul style="list-style-type: none"> - Minimum 5 years of work experience in the planning, training of LGUs, packaging proposals, project development, investment packaging • minimum = 21 points • additional 5 points for additional years of experience 	30	

	- Minimum 3 years in energy related planning, research, policy studies (minimum = 35 points, additional 5 points for every year of experience)	50	
3.2 b	Senior Expert		50
	• Educational Background: minimum AB/BS degree in economics, engineering, business, environmental science, urban/rural planning, public administration) [minimum = 7points; additional 1 point for every additional degree, full 10 points if MA/MS degree holder in the courses mentioned above or BS engineering (licensed), if not AB/BS level = 0 points regardless of years of experience]	10	
	Experience: - minimum 3 years of experience in socio-economic research and/or development planning, investment packaging, project development (minimum 14 points; additional 2 points for every additional year)	20	
	- minimum 3 years of actual experience in working, planning, training with government agencies or local government units (minimum 14 points; additional 2 points for every additional year)	20	
3.2 c	Junior Expert		50
	Education: minimum AB/BS degree of relevant social science course, engineering, business, public administration [minimum of 7points; additional 1 point for every additional degree, full 10 points if MA/MS level on any of the courses above or BS engineering (even if non license), if non graduate = 0 points regardless of years of experience]	10	
	Experience: - minimum 2 years of experience in research, community development, and/or planning, or training (minimum = 28 points; additional 2 points for every additional year)	40	
Total Section 3			300
GRAND TOTAL SECTIONS 1, 2 AND 3			1000

M. Annexes to the TOR

Please refer to www.doe.gov.ph for documents related to renewable energy projects and other relevant laws and regulations like the Joint Circular Memorandum *Guidelines to Facilitate the Implementation of Energy Projects*.

ANNEX 4

Previous Relevant Experience/Track Record

Please list only previous similar 5 assignments successfully completed in the last 5 years.

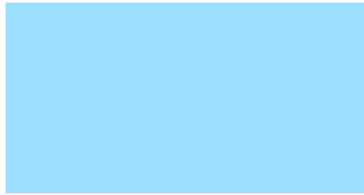
List only those assignments for which the Bidder was legally contracted or sub-contracted by the Client as a company or was one of the Consortium/JV partners. Assignments completed by the Bidder's individual experts working privately or through other firms cannot be claimed as the relevant experience 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 in PhP	Period of activity and status	Types of activities undertaken

ANNEX 5

Format for CV of Proposed Key resources

Name of Personnel	[Insert]
Contact Details	<ul style="list-style-type: none"> ▪ Present/Home Address: [Insert] ▪ Email Address: [Insert] ▪ Contact Numbers: [Insert]
Key achievements related to this assignment	[Insert]
Nationality	[Insert]
Language proficiency	[Insert]
Education/ Qualifications	<p><i>[Summarize college/university and other specialized education of personnel member, giving names of schools, dates attended, and degrees/qualifications obtained.]</i></p> <p>[Insert]</p>
Professional certifications	<p><i>[Provide details of professional certifications relevant to the scope of services]</i></p> <ul style="list-style-type: none"> ▪ Name of institution: [Insert] ▪ Date of certification: [Insert]
Employment Record/ Experience	<p><i>[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 experiences, detail the type of activities performed, degree of responsibilities, location of assignments and any other information or professional experience considered pertinent for this assignment.]</i></p> <ul style="list-style-type: none"> ▪ Name of institution: [Insert] ▪ Date of Employment: [Insert] ▪ Position: [Insert] ▪ Details of activities/functions performed: [Insert] <ul style="list-style-type: none"> ▪ Name of institution: [Insert] ▪ Date of Employment: [Insert] ▪ Position: [Insert] ▪ Details of activities/functions performed: [Insert] <ul style="list-style-type: none"> ▪ Name of institution: [Insert] ▪ Date of Employment: [Insert] ▪ Position: [Insert] ▪ Details of activities/functions performed: [Insert]
References	<p><i>[Provide names, addresses, phone and email contact information for two (2) references]</i></p> <p>Reference 1: Name: Phone Number: Email address:</p>



Reference 2:
Name:
Phone Number:
Email address:

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 and that I am available to undertake this project.

Signature of Personnel

Date (Day/Month/Year)

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)
Professional Fees (from Table 2)	
Other Costs (from Table 3)	
Total Amount of Financial Proposal	

Table 2: Breakdown of Professional Fees


Name	Position	Daily Fee Rate	No. of Days	Total Amount
		A	B	C=A+B
Subtotal Professional Fees:				

Table 3: Breakdown of Other Costs (if applicable)

Description	UOM	Quantity	Unit Price	Total Amount
Flights	Trip			
Subsistence allowance	Day			
Miscellaneous travel expenses	Trip			
Local transportation costs	Lump Sum			
Out-of-Pocket Expenses				
Other Costs: (please specify)				
Subtotal Other Costs:				

Table 4: Breakdown of Price per Deliverable/Activity based on ToR

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

	<h2 style="margin: 0;">Vendor /Person Profile Update</h2>
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SECTION 1 (For Internal Use only)		UN INFORMATION	
Requesting Person:	Date:	Atlas Vendor No:	
First Name / Last Name/Extension		UN Index No:	
VENDOR TYPE: <input type="checkbox"/> STAFF <input type="checkbox"/> SSA <input type="checkbox"/> SERVICE CONTRACT <input type="checkbox"/> MEETING PARTICIPANT <input type="checkbox"/> NGO <input type="checkbox"/> SUPPLIER <input type="checkbox"/> OTHER			
VENDOR APPROVER SIGNATURE: _____		DATE: _____	

Complete either Section 2 or Section 3 (not both)

SECTION 2 PERSON INFORMATION (For Individuals only)			
Last Name	First Name	Middle Name	
Nationality		Sex: Male <input checked="" type="checkbox"/> Female <input type="checkbox"/>	
Address			
City,	State/Province/Country	Postal Code (ZIP)	Country
E-mail Address	Telephone Number	Fax Number	

SECTION 3 SUPPLIER INFORMATION (For Companies only)			
Company Name:	Parent Company Name (if applicable)	Web Site URL (if applicable)	
Street Address			
City	State/Province/Country	Postal Code	Country PHILIPPINES
Contact Person (MAIN ADDRESS)		Telephone	Fax
Name:			E-mail Address
Title:			

SECTION 4 BENEFICIARY BANKING INFORMATION			
Bank Name			
Bank ID:	For US banks only use whether: (9 digits) ACH <input type="checkbox"/> Fed wire <input type="checkbox"/>		SWIFT code 8 or 11 characters (required for overboard payments)
Branch ID: (for Canadian Banks only) 9 digits routing no.		Branch Name:	
Street Address:			
City	State/Province	Postal Code	Country

SECTION 5 BENEFICIARY BANK ACCOUNT DETAILS			
Account Name: (name as it appears on bank account)		Bank Account Currency <input type="checkbox"/> US\$ <input type="checkbox"/> Other (PLEASE INDICATE)	
Bank Account No.: (ENTER WITH NO PUNCTUATION, NO DOTS, DASHES OR SPACES)		Account Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings	
IBAN (European Banks)			
Transit Code (5 digit) Canadian Banks	Sort Code (6 digit) UK Banks	BSB code (6 digit) Australia Banks	
Bank Information for intermediary/Correspondent Bank (if applicable)			
Name of Bank:		Address of Bank:	
Bank Account No. (of beneficiary bank with intermediary bank)		SWIFT Code:	FED WIRE NO. (US BANKS ONLY)
I, _____, in my capacity as _____, hereby authorize the agency to direct payments for goods and services to the above account. Signature: _____			