



Date: 17 September 2020

Addendum # 1
RFP-2020-15 - Long-Term Agreement (LTA) for
Capacity Building and Research Support for
Tax and Innovative Climate Change Financing Instruments Workstream under Climate Finance
Network (CFN)

This addendum is issued with the purpose to amend **RFP-2020-15** dated 02 September 2020 as follow:

- **BDS 14 [Deadline for Submission]** - The proposal submission deadline has been extended till **4:00PM (Bangkok Time), 12 October 2020 (Monday)**.
- **Section 4 [Technical Evaluation Point Distribution]** - The Technical Evaluation Point distribution has been revised and attached below.
- **Section 5 [Terms of Reference]** – There is a minor change in the Wording under Section J - Expected duration of the contract/assignment of the ToR as attached below.

All other clauses and conditions of the RFP shall remain unchanged.

Only complete proposal against this RFP will be considered for further evaluation. The bidders are reminded to submit all the required documents with its submission.

This Addendum #1 constitutes an integral part of the bidding documents for **RFP-2020-15**

Yours sincerely

A handwritten signature in blue ink, appearing to read 'Keshini', is positioned above the printed name.

Keshini Wijesundera
Manager, Transactional Services Team, BRH

Section 4 - Technical Evaluation Point Distribution

Summary of Technical Proposal Evaluation Forms		Points Obtainable
1.	Bidder's qualification, capacity and experience	200
2.	Proposed Methodology, Approach and Implementation Plan	500
3.	Qualifications of Key Personnel	300
	Total	1,000

Section 1. Bidder's qualification, capacity and experience		Points obtainable
1.1	Organizational Commitment to Sustain ability <ul style="list-style-type: none"> Organization is compliant with ISO 14001 or ISO 14064 or equivalent (20 points) Organization is a member of the UN Global Compact (10 points) Organization demonstrates significant commitment to sustainability through some other means (10 points) for example, internal company policy documents on women empowerment, renewable energies or membership of trade institutions promoting such issues 	40
1.2	Proven years of international and/or national experience in providing capacity building and research support to the government and/or any public sector on Tax and Innovative Climate Change Financing Instruments. <ul style="list-style-type: none"> 1-3 years – 30 points 4-5 years – 45 points More than 5 years– 60 points 	60
1.3	Relevant capacity building and/or research profile on public - private international finance mapping for government and/or relevant public sector on Direct Access to International Climate Change Finance. Project profiles/example of assignments are to be provided as evidence. <ul style="list-style-type: none"> 3-5 projects – 60 points 6-8 projects – 80 points More than 8 projects - 100 points 	100
Total Section 1		200

Section 2. Proposed Methodology, Approach and Implementation Plan		Points obtainable
2.1	Understanding of the requirements (overall presentation of the technical proposal): the bidder can explain clearly the approach and methodology in delivering technical support on Tax and Innovative Climate Change Financing Instruments. <ul style="list-style-type: none"> Understanding of the requirement but fail to explain the important aspects of the task - 60 	100

Section 2. Proposed Methodology, Approach and Implementation Plan		Points obtainable
	<ul style="list-style-type: none"> Well structure technical proposal, showing understanding of requirement and addressing important aspects of the task – 80 Comprehensive technical proposal, show in-depth understanding of requirement and addressing important aspects of the task with clear examples –100 	
2.2	<p>Description of the approach / methodology: the bidder can explain clearly the approach / methodology of the technical proposal that meets or exceeds the requirements of the Terms of Reference.</p> <ul style="list-style-type: none"> Description of approach <i>moderately meets</i> the requirements of the ToR – 120 Description of approach <i>meets</i> the requirements of the ToR – 160 Description of approach <i>meets and exceeds</i> the requirements of the ToR - 200 	200
2.3	<p>Details on how the different service elements shall be organized, controlled, and delivered. How comprehensive is the implementation plan?</p> <ul style="list-style-type: none"> Bidders provide <i>minimum</i> details on how different service elements shall be organized, controlled and delivered for selected workstream(s) – 60 Bidders provide <i>clear</i> details, showing an understanding of how different service elements shall be organized, controlled and delivered the selected workstream(s) – 120 Bidders provide <i>comprehensive details with examples</i> that demonstrate how different service elements shall be organized, controlled and delivered for selected workstream(s)– 150 	150
2.4	<p>Description of available performance monitoring and evaluation mechanisms and tools; how they shall be adopted and used for a specific requirement(s).</p> <ul style="list-style-type: none"> Bidders provide <i>basic</i> M&E mechanism and/or tools that can be used to ensure appropriate implementation plan – 30 Bidders provide <i>clear and well-integrated</i> M&E mechanism and/or tools that can be used to ensure appropriate implementation plan -40 Bidders provide <i>excellent and well-integrated</i> M&E mechanism and/or tools that can be used to ensure appropriate implementation plan - 50 	50
Total Section 2		500

Section 3. Management Structure and Qualifications of key personnel		Points obtainable
3.1	<p>Proposed composition and team structure i.e. the organization organogram with short biography of each proposed position, showing how the proposed team is linked and/or positioned in the organization, JV, Consortium and Association. Provide clear CVs with clear explanation on how the management role and implementation role are divided among team members or as fit with the services provided.</p> <ul style="list-style-type: none"> Provided information of team structure but the description of the roles, short biography, functions of key personnel as linked to the overall organization were absent or unclear – 15 Provided information with comprehensive description on the team structure, short biography, roles/functions of key personnel as linked to the overall organization – 30 	30
3.2	Qualifications of key personnel proposed	270
3.2a	Team Leader / LTA Coordinator	70

Section 3. Management Structure and Qualifications of key personnel			Points obtainable
	<p>A Master degree or higher in the field of Economics, Finance, taxation and fiscal policy, environmental economics, climate change, natural resource management, energy studies, and/or other relevant fields.</p> <ul style="list-style-type: none"> • Yes – relevant degree – 5 • No relevant degree - 0 	5	
	<p>Experience in the field of at least two of the following areas:</p> <p><input type="checkbox"/> Green/climate finance</p> <p><input type="checkbox"/> Carbon pricing/ carbon tax</p> <p><input type="checkbox"/> Innovative finance instruments like green bonds, taxation,</p> <p><input type="checkbox"/> Green private sector development</p> <ul style="list-style-type: none"> • 2 areas of expertise – 5 • More than 2 areas of expertise - 10 	10	
	<p>Experience in strategic planning and budgeting/capacity building/policy analysis and/or research advisory services</p> <ul style="list-style-type: none"> • 3-5 years - 10 • 6-8 years – 20 • More than 8 years – 30 	30	
	<p>Experience working with countries on tax and innovative climate change financing instruments and be able to lead consultations with senior government officials and facilitate discussions among a wide group of stakeholders.</p> <ul style="list-style-type: none"> • 3-5 years - 15 • 6-8 years – 20 • More than 8 years – 25 	25	
3.2b	Capacity Building Specialist (2 positions)		100
	<p>A Master degree or higher in the field of Economics, Finance, taxation and fiscal policy, environmental economics, climate change, natural resource management, energy studies, and/or other relevant fields as per selected workstream(s)¹</p> <ul style="list-style-type: none"> • Yes – relevant degree – 10 • No relevant degree - 0 	10	
	<p>Direct experience providing countries capacity building on tax and innovative climate change financing instruments and be able to lead consultations with senior government officials and facilitate discussions among a wide group of stakeholders.</p> <ul style="list-style-type: none"> • 3-5 years - 10 • 6-8 years – 15 • More than 8 years – 20 	20	

¹ The bidders have to choose one or more workstream(s) they want to bid as below:

- Climate change aligned budgeting and planning
- Direct access to international climate change finance
- Tax and innovative climate change financing instruments
- Gender and social inclusion and climate change finance
- Transparency and accountability of climate change finance
- Modelling climate change impacts on economic growth

Section 3. Management Structure and Qualifications of key personnel			Points obtainable
	<p>Progressive experience delivering capacity building in providing hands on project management and strategic direction on climate finance, and or public-private partnership / private finance.</p> <ul style="list-style-type: none"> 1-3 years - 10 4-5 years – 20 More than 5 years - 30 	30	
	<p>Strong technical knowledge in environment and climate change, with technical expertise in at least two or more area of the project focus i.e. climate change, disaster risk reduction, environmental risk assessment and management, green growth, environmental policy, environment and climate finance, sustainable practices for extractive industries, access to justice and civic engagement on environmental standards, social inclusion.</p> <ul style="list-style-type: none"> 3-5 years - 20 6-8 years – 30 More than 8 years – 40 	40	
3.2c	Research Specialist (2 positions)		100
	<p>A Master degree or higher in the field of Economics, Finance, taxation and fiscal policy, environmental economics, climate change, natural resource management, energy studies, and/or other relevant fields as per selected workstream(s).</p> <ul style="list-style-type: none"> Yes – relevant degree – 10 No relevant degree - 0 	10	
	<p>Proven years of research expertise in delivering capacity building and research support on taxation particularly the implications of interactions with other policies – in particular in the fiscal targets, economic fallouts of carbon taxation and impact on sectors particularly energy; transport and infrastructure.</p> <ul style="list-style-type: none"> 1-3 years - 20 4-5 years – 30 More than 5 years - 40 	40	
	<p>Proven years of analytical expertise in providing analytical advice/ conducting participatory action research / data mapping and /or collaborative studies/ market analytics and policy formulation/ impact measurement and reporting/ green investment.</p> <ul style="list-style-type: none"> 1-3 years - 30 4-5 years – 40 More than 5 years - 50 	50	
Total Section 3			300

The experts mentioned above will be evaluated as part of technical evaluation. However, the firm is expected to provide the organogram to indicate that it has a technical pool of experts which can be deployed as per the nature of assignment.



Section J of the Terms of Reference

Expected duration of the contract/assignment

The assignment, under this Long-Term Agreement (On Call basis), is expected to have a duration of 3 years with a possibility for an extension to 5 years, depending on the performance.

The *Contractor(s)* will work remotely with missions required and support to countries primarily in Asia Pacific and could cover other regions if opportunities emerge.

Duration of each assignment following the establishment of LTAs will vary and will be specified in the TOR.