REQUEST FOR PROPOSAL

Consultancy Services (Firm) to Manage the Entrepreneurship Component of the Innovation for Social Impact Partnership Project

RFP No.: RFP-033-PHL-2022
Project: Innovation for Social Impact Partnership (ISIP)
Country: Philippines

Issued on: 28 March 2022
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SECTION 1. LETTER OF INVITATION

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
  - Form A: Technical Proposal Submission Form
  - Form B: Bidder Information Form
  - Form C: Joint Venture/Consortium/Association Information Form
  - Form D: Qualification Form
  - Form E: Format of Technical Proposal
  - Form F: Financial Proposal Submission Form
  - 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 procurement.ph@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: ___________________________

Name: Kristel Aberilla                      Name: Samantha Gunasekera
Title: Procurement Associate                Title: Operations Manager
Date: March 28, 2022                        Date: March 28, 2022
SECTION 2. INSTRUCTION TO BIDDERS

A. GENERAL PROVISIONS

1. Introduction

1.1 Bidders shall adhere to all the requirements of this RFP, including any amendments in writing by UNDP. 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 https://popp.undp.org/SitePages/POPPBSUnit.aspx?TermID=254a9f96-b883-476a-8ef8-e81f93a2b38d

1.2 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. UNDP is under no obligation to award a contract to any Bidder as a result of this RFP.

1.3 As part of the bid, it is desired that the Bidder registers at the United Nations Global Marketplace (UNGM) website (www.ungm.org). 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.

2. Fraud & Corruption, Gifts and Hospitality

2.1 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 http://www.undp.org/content/undp/en/home/operations/accountability/audit/office_of_audit_andinvestigation.html#anti

2.2 Bidders/vendors shall not offer gifts or hospitality of any kind to UNDP staff members including recreational trips to sporting or cultural events, theme parks or offers of holidays, transportation, or invitations to extravagant lunches or dinners.

2.3 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.

2.4 All Bidders must adhere to the UN Supplier Code of Conduct, which may be found at https://www.un.org/Depts/ptd/about-us/un-supplier-code-conduct

3. Eligibility

3.1 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.

3.2 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.
### 4. Conflict of Interests

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:

- 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;
- b) Were involved in the preparation and/or design of the programme/project related to the services requested under this RFP; or
- c) Are found to be in conflict for any other reason, as may be established by, or at the discretion of UNDP.

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.

Similarly, the Bidders must disclose in their proposal their knowledge of the following:

- 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
- b) All other circumstances that could potentially lead to actual or perceived conflict of interest, collusion or unfair competition practices.

Failure to disclose such an information may result in the rejection of the proposal or proposals affected by the non-disclosure.

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.

### B. PREPARATION OF PROPOSALS

#### 5. General Considerations

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.

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.

#### 6. Cost of Preparation of Proposal

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.

#### 7. Language

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.

#### 8. Documents

The Proposal shall comprise of the following documents:
| **Comprising the Proposal** | a) Documents Establishing the Eligibility and Qualifications of the Bidder;  
| | b) Technical Proposal;  
| | c) Financial Proposal;  
| | d) Proposal Security, if required by BDS;  
| | e) Any attachments and/or appendices to the Proposal. |
| **9. Documents Establishing the Eligibility and Qualifications of the Bidder** | 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 documents required in those forms. In order to award a contract to a Bidder, its qualifications must be documented to UNDP’s satisfaction. |
| **10. Technical Proposal Format and Content** | 10.1 The Bidder is required to submit a Technical Proposal using the Standard Forms and templates provided in Section 6 of the RFP.  
| | 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.  
| | 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  
| | 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. |
| **11. Financial Proposals** | 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.  
| | 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.  
| | 11.3 Prices and other financial information must not be disclosed in any other place except in the financial proposal. |
| **12. Proposal Security** | 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.  
| | 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.  
| | 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.  
| | 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.  
| | 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:  
| | a) If the Bidder withdraws its offer during the period of the Proposal Validity specified in the BDS, or;  
| | b) In the event that the successful Bidder fails: |
| 12.6 | i. to sign the Contract after UNDP has issued an award; or  
|      | 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. |
| 13. | **Currencies**  
| 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:  
|      | a) 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  
|      | 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. |
| 14. | **Joint Venture, Consortium or Association**  
| 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.  
| 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.  
| 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.  
| 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.  
| 14.5 | A JV, Consortium or Association in presenting its track record and experience should clearly differentiate between:  
|      | a) Those that were undertaken together by the JV, Consortium or Association; and  
|      | b) Those that were undertaken by the individual entities of the JV, Consortium or Association.  
| 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.  
| 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. |
15. **Only One Proposal**

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.

15.2 Proposals submitted by two (2) or more Bidders shall all be rejected if they are found to have any of the following:

- f) they have at least one controlling partner, director or shareholder in common; or
- g) any one of them receive or have received any direct or indirect subsidy from the other/s; or
- h) they have the same legal representative for purposes of this RFP; or
- i) 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;
- j) they are subcontractors to each other’s Proposal, or a subcontractor to one Proposal also submits another Proposal under its name as lead Bidder; or
- k) 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.

16. **Proposal Validity Period**

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.

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.

17. **Extension of Proposal Validity Period**

17.1 In exceptional circumstances, prior to the expiration of the proposal validity period, UNDP 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.

17.2 If the Bidder agrees to extend the validity of its Proposal, it shall be done without any change in the original Proposal.

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.

18. **Clarification of Proposal**

18.1 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.

18.2 UNDP will provide the responses to clarifications through the method specified in the BDS.

18.3 UNDP 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.

19. **Amendment of Proposals**

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.
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<td><strong>19.2</strong></td>
<td>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.</td>
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<td><strong>20.  Alternative Proposals</strong></td>
<td>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.</td>
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<td>20.2 If multiple/alternative proposals are being submitted, they must be clearly marked as “Main Proposal” and “Alternative Proposal”.</td>
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<td><strong>21.  Pre-Bid Conference</strong></td>
<td>21.1 When appropriate, a Bidder’s conference will be conducted at the date, time 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.</td>
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<tr>
<td><strong>C. SUBMISSION AND OPENING OF PROPOSALS</strong></td>
<td><strong>22. Submission</strong> 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. 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. 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. 22.4 Hard copy (manual) submission by courier or hand delivery allowed or specified in the BDS shall be governed as follows: 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. 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: i. Bear the name and address of the bidder; ii. Be addressed to UNDP as specified in the BDS.</td>
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### Email Submission

iii. Bear a warning that states “Not to be opened before the time and date for proposal opening” as specified in the BDS.

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.

#### 22.5 Email submission, if allowed or specified in the BDS, shall be governed as follows:

a) Electronic files that form part of the proposal must be in accordance with the format and requirements indicated in BDS;

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.

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.

### eTendering submission

#### 22.6 Electronic submission through eTendering, if allowed or specified in the BDS, shall be governed as follows:

a) Electronic files that form part of the proposal must be in accordance with the format and requirements indicated in BDS;

b) The Technical Proposal and the Financial Proposal files MUST BE COMPLETELY SEPARATE and each of them must be uploaded individually and clearly labelled.

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.

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.

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: [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/)

### 23. Deadline for Submission of Proposals and Late Proposals

#### 23.1 Complete Proposals must be received by UNDP 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

#### 23.2 UNDP shall not consider any Proposal that is submitted after the deadline for the submission of Proposals.

### 24. Withdrawal, Substitution, and Modification of

#### 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.

#### 24.2 Manual and Email submissions: A bidder may withdraw, substitute or modify its
| Proposals                                                                 | 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.”  

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.  

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.  

25. Proposal Opening | 25.1 There is no public bid opening for RFPs. UNDP 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.  

D. EVALUATION OF PROPOSALS  

26. Confidentiality | 26.1 Information relating to the examination, evaluation, and comparison of Proposals, and the recommendation of contract award, shall not be disclosed to Bidders or any other persons not officially concerned with such process, even after publication of the contract award.  

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.  

27. Evaluation of Proposals | 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 will conduct the evaluation solely on the basis of the submitted Technical and Financial Proposals.  

27.2 Evaluation of proposals is made of the following steps:  

a) Preliminary Examination  
b) Minimum Eligibility and Qualification (if pre-qualification is not done)  
c) Evaluation of Technical Proposals  
d) Evaluation of Financial Proposals  

28. Preliminary Examination | 28.1 UNDP 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.  

29. Evaluation of Eligibility and Qualification | 29.1 Eligibility and Qualification of the Bidder will be evaluated against the Minimum Eligibility/Qualification requirements specified in the Section 4 (Evaluation Criteria).  

29.2 In general terms, vendors that meet the following criteria may be considered qualified:  

e) 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;
f) They have a good financial standing and have access to adequate financial resources to perform the contract and all existing commercial commitments,
g) 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;
h) They are able to comply fully with UNDP General Terms and Conditions of Contract;
i) They do not have a consistent history of court/arbitral award decisions against the Bidder; and
j) They have a record of timely and satisfactory performance with their clients.

30. Evaluation of Technical and Financial Proposals

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.

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.

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.

30.4 When the BDS specifies a combined scoring method, the formula for the rating of the Proposals will be as follows:

Rating the Technical Proposal (TP):

\[
TP \text{ Rating} = \left( \frac{\text{Total Score Obtained by the Offer}}{\text{Max. Obtainable Score for TP}} \right) \times 100
\]

Rating the Financial Proposal (FP):

\[
FP \text{ Rating} = \left( \frac{\text{Lowest Priced Offer}}{\text{Price of the Offer Being Reviewed}} \right) \times 100
\]

Total Combined Score:

\[
\text{Combined Score} = (\text{TP Rating}) \times (\text{Weight of TP, e.g. 70%}) + (\text{FP Rating}) \times (\text{Weight of FP, e.g., 30%})
\]
| 31. **Due Diligence** | 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:

   a) Verification of accuracy, correctness and authenticity of information provided by the Bidder;
   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;
   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;
   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;
   e) Physical inspection of the Bidder’s offices, branches or other places where business transpires, with or without notice to the Bidder;
   f) Other means that UNDP may deem appropriate, at any stage within the selection process, prior to awarding the contract. |

| 32. **Clarification of Proposals** | 32.1 To assist in the examination, evaluation and comparison of Proposals, UNDP may, at its discretion, ask any Bidder for a clarification of its Proposal.

   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 arithmetic errors discovered by UNDP in the evaluation of the Proposals, in accordance with RFP.

   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. |

| 33. **Responsiveness of Proposal** | 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.

   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. |

| 34. **Nonconformities, Reparable Errors and Omissions** | 34.1 Provided that a Proposal is substantially responsive, UNDP may waive any non-conformities or omissions in the Proposal that, in the opinion of UNDP, do not constitute a material deviation.

   34.2 UNDP 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.

   34.3 For Financial Proposal that has been opened, UNDP shall check and correct arithmetical errors as follows:

      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;

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

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.

34.4 If the Bidder does not accept the correction of errors made by UNDP, its Proposal shall be rejected.

### E. AWARD OF CONTRACT

#### 35. Right to Accept, Reject, Any or All Proposals

35.1 UNDP 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.

#### 36. Award Criteria

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.

#### 37. Debriefing

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 shall not be discussed.

#### 38. Right to Vary Requirements at the Time of Award

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.

#### 39. Contract Signature

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.

#### 40. Contract Type and General Terms and Conditions

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 [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)

#### 41. Performance Security

41.1 40.1 A performance security, if required in BDS, shall be provided in the amount specified in BDS and form available at [https://popp.undp.org/_layouts/15/WopiFrame.aspx?sourcedoc=/UNDP_POPP_DOCUMENT_LIBRARY/Public/PSU_Solicitation_Performance%20Guarantee%20Form.docx&action=default](https://popp.undp.org/_layouts/15/WopiFrame.aspx?sourcedoc=/UNDP_POPP_DOCUMENT_LIBRARY/Public/PSU_Solicitation_Performance%20Guarantee%20Form.docx&action=default) 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
<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>42. Bank Guarantee for Advanced Payment</strong></td>
<td>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_POPPDOCUMENT_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_POPPDOCUMENT_LIBRARY/Public/PSU_Contract%20Management%20Payment%20and%20Taxes_Advanced%20Payment%20Guarantee%20Form.docx&amp;action=default</a></td>
</tr>
<tr>
<td><strong>43. Liquidated Damages</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>44. Payment Provisions</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>45. Vendor Protest</strong></td>
<td>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></td>
</tr>
<tr>
<td><strong>46. Other Provisions</strong></td>
<td>46.1 In the event that the Bidder offers a lower price to the host Government (e.g. 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.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>
**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.

<table>
<thead>
<tr>
<th>BDS No.</th>
<th>Ref. to Section.2</th>
<th>Data</th>
<th>Specific Instructions / Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>7</td>
<td>Language of the Proposal</td>
<td>English</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>Submitting Proposals for Parts or sub-parts of the TOR (partial bids)</td>
<td>Not Allowed</td>
</tr>
<tr>
<td>3</td>
<td>20</td>
<td>Alternative Proposals</td>
<td>Shall not be considered</td>
</tr>
</tbody>
</table>
| 4       | 21                | **Pre-proposal conference** | **Will be Conducted**  
*Time: 10:00 AM, Manila Time*  
*Date: March 31, 2022 10:00 AM*  
*Venue: A Zoom link will be provided to bidders who will confirm their attendance by sending an email to procurement.ph@undp.org with the following details: Company name, Company Address, Name of Representative, Email address.*  
*Please confirm participation by 30 March 2022.* |
<p>| 5       | 10                | Proposal Validity Period | 120 days |
| 6       | 14                | Bid Security | Not Required |
| 7       | 41                | Advanced Payment upon signing of contract | Not Allowed |
| 8       | 42                | Liquidated Damages | Will not be imposed |
| 9       | 40                | Performance Security | Not Required |
| 10      | 18                | Currency of Proposal | Philippine Peso for local firms; United States Dollar for international firms |
| 11      | 31                | Deadline for submitting requests for clarifications/ questions | 5 days before the submission deadline |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>
| **Contact Details for submitting clarifications/questions** | Focal Person in UNDP: Kristel Aberilla  
Email Address: procurement.ph@undp.org |
| **Manner of Disseminating Supplemental Information to the RFP and responses/clarification s to queries** | Posted directly to eTendering |
| **Deadline for Submission** | For eTendering submission - as indicated in eTendering system. Note that system time zone is in EST/EDT (New York) time zone. |
| **Allowable Manner of Submitting Proposals** | e-Tendering |
| **Proposal Submission Address** | [https://etendering.partneragencies.org](https://etendering.partneragencies.org)  
**Insert BU Code and Event ID number**  
**Business Unit: PHL10**  
**Event ID: 0000011970** |
| **Electronic submission (eTendering) requirements** | **Format: PDF files only**  
**File names must be maximum 60 characters long and must not contain any letter or special character other than from Latin alphabet/keyboard.**  
**All files must be free of viruses and not corrupted.**  
**The Technical Proposal and the Financial Proposal files MUST BE COMPLETELY SEPARATE. The financial proposal shall be encrypted with a PASSWORD and clearly labelled. The password for Financial Proposal must not be provided to UNDP until requested by UNDP.**  
**In the e-tendering system, where prompted to enter the Bid Price, bidder MUST indicate “1” (one) as the price offer.** |
| **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%. |
<p>| <strong>Expected date for commencement of Contract</strong> | <strong>May 2, 2022</strong> |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th>Maximum expected duration of contract</th>
<th>11 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>35</td>
<td>UNDP will award the contract to:</td>
<td>One Proposer Only</td>
</tr>
<tr>
<td>21</td>
<td>39</td>
<td>Type of Contract</td>
<td>Contract for Goods and/or Services</td>
</tr>
<tr>
<td>22</td>
<td>39</td>
<td>UNDP Contract Terms and Conditions that will apply</td>
<td>UNDP General Terms and Conditions for Contracts (Goods and/or Services)</td>
</tr>
</tbody>
</table>
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; Financial Proposal must be password-protected
- 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.

<table>
<thead>
<tr>
<th>Subject</th>
<th>Criteria</th>
<th>Document Submission requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>ELIGIBILITY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legal Status</td>
<td>Vendor is a legally registered entity.</td>
<td>Form B: Bidder Information Form</td>
</tr>
<tr>
<td>Eligibility</td>
<td>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.</td>
<td>Form A: Technical Proposal Submission Form</td>
</tr>
<tr>
<td>Conflict of Interest</td>
<td>No conflicts of interest in accordance with ITB clause 4.</td>
<td>Form A: Technical Proposal Submission Form</td>
</tr>
<tr>
<td>Bankruptcy</td>
<td>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.</td>
<td>Form A: Technical Proposal Submission Form</td>
</tr>
<tr>
<td></td>
<td>The Bidder or its partner (as part of a Joint Venture/Consortium/Association or as a Subcontractor) shall either be a non-profit institution (e.g., academic institutions and other non-government organizations) or a commercial firm (e.g., management consulting companies, research outfits, etc.) duly registered to conduct business in the Philippines.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The Bidder or its partner (as part of a joint venture, consortium, or association or as a subcontractor) must have a local office and presence in the Philippines and must be able to work in and travel to BARMM, Davao, Cagayan de Oro, and General Santos City.</td>
<td></td>
</tr>
<tr>
<td>QUALIFICATION</td>
<td></td>
<td></td>
</tr>
<tr>
<td>History of Non-Performing</td>
<td>Non-performance of a contract did not occur as a result of contractor default for the last 3 years.</td>
<td>Form D: Qualification Form</td>
</tr>
<tr>
<td>Contracts¹</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

¹ Non-performance, as decided by UNDP, shall include all contracts where (a) non-performance was not challenged by the contractor.
<table>
<thead>
<tr>
<th><strong>Litigation History</strong></th>
<th>No consistent history of court/arbitral award decisions against the Bidder for the last 3 years.</th>
<th>Form D: Qualification Form</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Previous Experience</strong></td>
<td>At least three (3) years of experience in incubation, acceleration, and fund management, with a track record of supporting sustainable development solutions addressing various socio-economic development issues <em>(For JV/Consortium/Association, all Parties cumulatively should meet requirement).</em></td>
<td>Form D: Qualification Form</td>
</tr>
<tr>
<td></td>
<td>Has implemented at least three (3) similar acceleration projects/programs in the country or in the ASEAN region, with demonstrated partnerships with the domestic and regional innovation and entrepreneurship ecosystem <em>(For JV/Consortium/Association, all Parties cumulatively should meet requirement).</em></td>
<td>Form D: Qualification Form</td>
</tr>
<tr>
<td><strong>Financial Standing</strong></td>
<td>Minimum average annual turnover of USD 120,000 for the last 3 years. <em>(For JV/Consortium/Association, all Parties cumulatively should meet requirement).</em></td>
<td>Form D: Qualification Form</td>
</tr>
</tbody>
</table>
| | Bidder must demonstrate the current soundness of its financial standing and indicate its prospective long-term profitability. 
Quick Ratio – minimum should be 1:1 *(For JV/Consortium/Association, all Parties cumulatively should meet requirement).* | Form D: Qualification Form |

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.
Technical Evaluation Criteria

1. This competitive selection process for the Firm will use the Combined Scoring Method, using the 70%-30% distribution for technical and financial proposals, respectively.

2. The minimum passing score of the technical proposal shall be 70% (700 out of 1000 obtainable points). Technical proposals will be evaluated based on the following primary criteria, as shown in the tables below.

<table>
<thead>
<tr>
<th>Summary Proposal Evaluation</th>
<th>Points Obtainable</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Eligibility, qualifications, capacity and experience of the Firm</td>
<td>350</td>
</tr>
<tr>
<td>2. Proposed methodology, approach and implementation plan</td>
<td>300</td>
</tr>
<tr>
<td>3. Management structure and key personnel</td>
<td>350</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,000</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Section 1. Eligibility, qualifications, capacity, and experience of the Firm</th>
<th>Points Obtainable</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1 General Organizational Capability which is likely to affect implementation: Management structure, financial stability and project management controls, extent to which any work would be subcontracted; existing network of partners in the enterprise support ecosystem, including in the financial sector</td>
<td>50</td>
</tr>
<tr>
<td>1.2 At least three (3) years of experience in incubation, acceleration, and fund management, with a track record of supporting sustainable development solutions addressing various socio-economic development issues</td>
<td>120</td>
</tr>
<tr>
<td>3 years = 84 points; additional 4 points for each additional year up to a maximum of 120 points</td>
<td></td>
</tr>
<tr>
<td>1.3 Has implemented at least three (3) similar incubation or acceleration projects/programs in the country or in the ASEAN region, with demonstrated partnerships with the domestic and regional innovation and entrepreneurship ecosystem</td>
<td>100</td>
</tr>
<tr>
<td>3 projects = 70 points; additional 5 points for each additional project up to a maximum of 100 points</td>
<td></td>
</tr>
<tr>
<td>1.5 Has sector leadership and experience working in Mindanao, specifically with at least one (1) project or program implemented, doing coordination work and/or conducting acceleration and capacity building activities in the area. Project experience in BARMM is highly preferred.</td>
<td>80</td>
</tr>
<tr>
<td>1 Mindanao project = 56 points; additional 4 points for each additional Mindanao project, additional 4 points for BARMM project implementation</td>
<td></td>
</tr>
<tr>
<td><strong>Total Section 1</strong></td>
<td><strong>350</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Section 2. Proposed methodology, approach, and implementation plan</th>
<th>Points Obtainable</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1 Understanding of the requirement and the strategy presented as</td>
<td>100</td>
</tr>
</tbody>
</table>
2.2 Description of the Offeror’s approach, methodology, and tools for meeting or exceeding the requirements of the Terms of Reference is backed by the Firm’s past and successful experience of having applied the same in relevant past projects; 100

2.3 Feasibility of the implementation plan proposed including whether the activities are properly sequenced, logical, and realistic assumptions are clearly defined and levels of effort of personnel to be assigned are appropriate to ensure quality of outputs. 100

<table>
<thead>
<tr>
<th>Section 2</th>
<th>Points Obtainable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>300</td>
</tr>
</tbody>
</table>

### Section 3. Qualifications of key personnel proposed

#### 3.1 Social Entrepreneurship Manager

- University degree in business management, economics, sustainable development, or a related field

  *University degree = 28 points; 34 points for Master’s; 40 points for Doctoral; additional 3 points for relevant specialized training in social entrepreneurship, etc.*

  - At least three (3) years of progressively responsible professional experience in the following: business development, social enterprise incubation/acceleration, fund management, grant-making or grant management, program management, and networking and communication with the ability to develop effective partnerships across a broad range of stakeholders; has business/entrepreneurial/financial experience

  *3 years = 28 points; additional 3 points up to a maximum of 40 points for each additional year.*

  - At least two (2) years of experience in designing and implementing incubation and acceleration programs, specifically performing hands-on business coaching/mentoring/advising to businesses, including start-ups

  *2 years = 28 points; additional 3 points up to a maximum of 40 points for each additional year.*

  - Excellent written and verbal communication skills in English and Filipino (indicated in CV).

  *Knowledge of local languages in Mindanao is desirable.*

#### 3.2 Administrative and Finance Officer

- University degree in finance, accounting, auditing, economics, business, or a Certified Public Accountant

  *University degree = 21 points; 26 points for Master’s; 30 points for Doctoral; additional 3 points for relevant specialized training in social entrepreneurship, etc.*

  - At least three (3) years of progressively responsible professional experience in project administrative and financial management, accounting, or auditing

  *30*
<table>
<thead>
<tr>
<th>3 years = 21 points; additional 3 points up to a maximum of 30 points for each additional year.</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive experience coordinating and working with counterparts at various levels of government and the private sector in similar projects</td>
<td>30</td>
</tr>
<tr>
<td>3 years = 21 points; additional 3 points up to a maximum of 30 points for each additional year.</td>
<td></td>
</tr>
<tr>
<td>Excellent written and verbal communication skills in English and Filipino (indicated in CV). Knowledge of local languages in Mindanao is desirable.</td>
<td>Pass/Fail for English and Filipino</td>
</tr>
</tbody>
</table>

### 3.3 Social Entrepreneurship Director

<table>
<thead>
<tr>
<th>Advanced University degree in economics, business, finance, sustainable development, or a related field</th>
<th>40</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master’s degree = 28 points; 40 points for Doctorate; additional 6 points for relevant specialized training in social entrepreneurship, etc.</td>
<td></td>
</tr>
<tr>
<td>At least seven (7) years of progressively responsible professional experience in the following: business development, social enterprise incubation/acceleration, fund management, grant-making or grant management, program management, business/entrepreneurial/financial experience, networking and communication, and developing effective partnerships across a broad range of stakeholders</td>
<td>60</td>
</tr>
<tr>
<td>7 years = 42 points; additional 3 points up for each additional year</td>
<td></td>
</tr>
<tr>
<td>At least three (3) years of experience in designing and implementing incubation and acceleration programs, specifically performing hands-on business coaching/mentoring/advising to businesses, including start-ups</td>
<td>40</td>
</tr>
<tr>
<td>3 years = 28 points; additional 2 points up to a maximum of 40 points for each additional year</td>
<td></td>
</tr>
<tr>
<td>Excellent written and verbal communication skills in English and Filipino (indicated in CV). Knowledge of local languages in Mindanao is desirable.</td>
<td>Pass/Fail for English and Filipino</td>
</tr>
</tbody>
</table>

**Total Section 3**  **350**

3. In the combined scoring, the Financial Proposal will be computed as a ratio of the Proposal’s offer to the lowest price among the proposals received by UNDP.
SECTION 5. TERMS OF REFERENCE

TERMS OF REFERENCE
Consultancy Services (Firm) to Manage the Entrepreneurship Component of the Innovation for Social Impact Partnership Project

A. Project Title

Innovation for Social Impact Partnership (ISIP)

B. Background and Rationale

In 2017, the Australian Government’s Department of Foreign Affairs and Trade (DFAT) and the United Nations Development Programme in the Philippines (UNDP) embarked on a six-year partnership to enable Philippine social enterprises (SEs) to successfully attract impact investors and achieve scale, thus increasing their contribution to the UN Sustainable Development Goals (SDGs). The partnership was concretized through the Innovation for Social Impact Partnership (ISIP) Project, which sought to serve as a proof of concept in the readiness for financing of social enterprises through the provision of access to domestic private capital and technical capacity to a point where they can mobilize resources from the substantial pool of global funds available for impact investments through capacity building, technical support, and policy reforms.

Results of the ISIP Midterm Review conducted in May 2020 demonstrated that the project was highly coherent, relevant, and effective in promoting gender equality and the concerns of the marginalized groups. Three social enterprises generated 193 jobs and the project enabled the social enterprises to access grants, equity, and contracts equivalent to US$255,000. The social enterprise initiatives on engaging women, indigenous people and conflict-affected persons did not only empower them but also provided incomes and employment, improved health care insurance, and environmental protection. The higher education institutions’ (HEIs) good practices contributed to the possible enhancement of the pipeline of future social enterprises and the engagement of local government units in supporting social enterprise development. The review recommendations were to improve and streamline the social enterprise ecosystem in the Philippines, such as, but not limited to, the recognition of social enterprises in the Philippines, stronger call for policymakers and national government to promote and streamline social entrepreneurship in the Philippines, institutionalization of support for social enterprises, and cultivation of more social enterprise-focused capital.

On the third year of ISIP implementation, the COVID-19 pandemic and the accompanying quarantine restrictions have dealt a heavy blow on almost all sectors of the Philippine economy. Various surveys conducted to rapidly assess the overall business environment in the country suggest that smaller businesses are disproportionately affected. Challenges concerning cash flow and working capital, piling debt and operational expenses, limited access to raw materials and other inputs, increasing production and operation costs, and cancellation of purchase orders have exacerbated the vulnerabilities of the micro, small, and medium enterprises.

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(MSMEs). SEs and SE-supporting organizations such as higher education institutions (HEIs) are no exception in experiencing the negative impacts of COVID-19.

While the project was able to respond to these pandemic-related challenges faced by the social enterprises and the ISIP partners in the academe by moving activities online, providing grants through the Innovative Solutions Grant Facility, and offering various capacity building initiatives especially on digitalization, among others, continuing support is needed to ensure that the social enterprises stay afloat and continue making impact, and that HEIs are able to implement the incubator plans that they have developed through ISIP.

On a larger scale, provision of support to social enterprises for their recovery or adaptation to the new challenges and accelerate their contributions in the period of recovery is now in the global and regional agenda, but the Philippines has yet to have a policy environment conducive to its growth and acceleration despite having a robust social enterprise sector of 164,473. Support and opportunities for growth for social enterprises also remain accessible to a few, particularly those in capital cities. Social enterprises in other areas in the country that have equally suffered from the pandemic on top of existing vulnerabilities, particularly in the Bangsamoro Autonomous Region in Muslim Mindanao (BARMM) and other provinces in Mindanao, remain underserved.

Following the success of its initial run, the ISIP project shall continue the provision of tailored support to select Philippine social enterprises to sustainably scale and strengthen their identified contributions to the SDGs in the period of recovery. ISIP will have an expanded scope in BARMM and other areas in Mindanao (specifically Davao City, General Santos City, Cagayan de Oro City), where such support is not widely available. This scope will be implemented from May 2022 to April 2023 and will have the following project components with corresponding outputs:

1. **Entrepreneurship**: Ten (10) social enterprises, majority of which are expected to be from or operate in Mindanao region, and five (5) of which will be women-led, are provided tailored support for growth, business acumen, and access to financing opportunities.
   a. **Support services**: The ISIP Project through the selected service provider will provide the SEs with tailored support services based on an SE diagnostics assessment. The menu of support services will include legal assistance, financial services, communications support, intellectual property rights, business development, and appropriate technologies. Each SE will be provided six to ten consultations of tailored support services.
   b. **Mentoring Services**: The ISIP project will match SEs to a mentor whose skills and experience are relevant to the SE’s current needs and goals. The mentors will conduct regular check-ins, mentoring and/or coaching sessions with SEs. Each SE will receive six structured mentoring sessions.
   c. **Social Impact Accelerator**: The Social Impact Accelerator (SIA) will provide the physical facility, mentoring venue, and technical support to fast-track the growth

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3 Ibid.
6 Women-led social enterprises are defined as enterprises that have at least one female co-founder.
of high-potential SEs in the Philippines. Through the SIA, admitted SEs will be able to gain access to ISIP partners’ network of resources to build their impact, refine their business, and potentially secure financing. The SIA will provide structured learning sessions support and culminate in a Demo Day activity.

1. The SIA will provide a structured learning sessions to equip SEs to be capital and investment ready. Subject to the final diagnostics of the SEs, these sessions may include topics on investment conversations, change management, financial management, business development, community engagement, managing team dynamics, impact measurement and management, grant proposal writing, perfect pitch, and Design Sprints for Rapid Business Innovation. Ten learning sessions will be provided.

2. The SIA will also provide a venue for the SEs to meet and build partnerships with the larger SE ecosystem. Three community events where SEs can meet, build, and develop partnerships with the ecosystem will be conducted.

3. The SIA will culminate in a Demo Day where all SEs will pitch to potential investors.

2. Education and Policy Components: Alignment and Coordination with the Education and Policy components of the project. This will include general project coordination and communications alignment and support for the incubation management workshop, visiting professor programs, policy dialogues, research, learning, and events.

C. Objective

UNDP seeks to engage a Firm with credible experience in social enterprise acceleration, project management, and strategic partnerships for the implementation of the Entrepreneurship component.

D. Scope of work

Under the direct supervision of the ISIP Project Manager to whom the Firm will be directly reporting to, and overall guidance of the UNDP Institutions and Partnerships Programme Team Leader and the ISIP Project Steering Committee, the Firm shall undertake the following:

1. Management and implementation of the Entrepreneurship component
   a. Review existing strategies, approaches, and activities previously designed for the Entrepreneurship component, including the selection and monitoring of innovative social enterprises, and propose updates or upgrades as necessary, especially that at least six (6) of the ten (10) SE beneficiaries will be from the target areas in Mindanao mentioned above, while the rest may come from Luzon and Visayas.
   b. Hold partnership meetings with Enterprise Supporting Organizations (ESOs), relevant national and local government units to be identified jointly by the Firm and UNDP, and other SE ecosystem stakeholders (e.g., impact investors), including those in the target areas in Mindanao mentioned above. These will serve as a venue to present the ISIP project and identify potential partnerships and collaborations for project implementation and shall be conducted online or in-person, subject to COVID-19 community quarantine restrictions.

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7 The Project Steering committee is composed of UNDP, DFAT-Australia, and relevant government agencies and sectoral partners.
8 The criteria for selection that have been used for previous cohorts include the following: (a) Problem definition and impact in relation to the SDGs, (b) Scalability of the solution, (c) Quality of the team, and (d) Financial sustainability.
c. Conduct the necessary risk assessment and due diligence (as per UNDP requirement) for the SEs that will be supported by the project through incubation/acceleration.
d. Facilitate collaborations and partnerships for resource mobilization for the Project, resource-leveraging, maintaining a roster of professional experts and resource persons to provide various support to SEs in various areas (e.g., legal, accounting and finance, information technology, e-commerce, human resource, marketing, communications, monitoring and evaluation, impact assessment, Business Call to Action for impact management, business continuity strategies, among others). These services may either be provided by the Firm through consultants or third-party service providers or pro bono by ESOs and other stakeholders, vetted and arranged by the firm in consultation with UNDP.
c. Facilitate supported SEs’ access to financing (non-grants) by exploring partnerships with potential sources of financing (e.g., venture capital, banks etc)
f. Coordinate closely with the ISIP Project Management Team to introduce resource persons for Business Call to Action (BCTA) for Impact Management\(^9\) and various UNDP tools for enterprises (e.g., SDG Impact Standards for enterprises, Business Integrity Toolkit) to the SEs that will be supported.

2. Project Planning, Monitoring, and Reporting of the Entrepreneurship Component
   a. Formulate an implementation plan with a detailed work plan for the project duration to deliver the outputs of the project and meet its targets, in accordance with the Project’s Results Framework.
   b. Share organization’s Standard Operating Procedures on Financial, Administrative, Human Resources, Project Management, M&E, and Communications procedures relevant to the operation of the Entrepreneurship component.
   c. Establish a financial management and monitoring and reporting system that will support regular reporting to UNDP, following UNDP financial rules and regulations\(^10\).
   d. Regularly report to UNDP (Quarter and Annual Progress Reports over 11 months), including a Project Completion Report with lessons learned, against financial and performance targets of the project, following UNDP financial rules and regulations and results-based management corporate guidance.
   e. Regularly communicate and coordinate with the UNDP project team on project activities, updates, and directions.
   f. Participate and contribute actively to Project Steering Committee meetings, and planning and assessment sessions

3. Communication, Coordination, and Knowledge Management
   Under the direct supervision of the UNDP ISIP Project Manager,
   a. Develop and implement an advocacy, awareness, and public engagement plan for the activities under the Entrepreneurship component, as a contribution to the ISIP Project Communications and Advocacy Strategy and Plan.
   b. In coordination with the ISIP communications consultant through the ISIP Project Manager, contribute, co-manage, update, and maintain ISIP communication channels, including the ISIP website and social media channels, under the Entrepreneurship component.
   c. Support knowledge management for the ISIP project, ensuring that all resources and knowledge products from the Entrepreneurship component are consolidated in the ISIP resource and learning portal.

\(^9\) BCTA is a unique multilateral alliance among donor governments launched at the United Nations in 2008 that aims to accelerate progress towards the SDGs. It offers services that help companies develop inclusive business models that engage people at the base of the economic pyramid (BoP). BCTA member companies are market leaders that provide examples of successful, profitable, and scalable models for reaching poor communities and contributing to global development.

\(^10\) [https://popp.undp.org/SitePages/POPPRoot.aspx](https://popp.undp.org/SitePages/POPPRoot.aspx)
### E. Expected Outputs

<table>
<thead>
<tr>
<th>Deliverables/ Outputs</th>
<th>Target Due Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Inception report with a detailed implementation plan.</td>
<td>Within one week of contract signing.</td>
</tr>
<tr>
<td>The implementation plan should include the following:</td>
<td></td>
</tr>
<tr>
<td>a. Details of each activity under all components (section B &amp; D) with respective resources and financial plan for implementation.</td>
<td></td>
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<tr>
<td>b. Communications and advocacy Strategy and Plan</td>
<td></td>
</tr>
<tr>
<td>The implementation plan will be presented to UNDP Project and Steering committee for discussion and review after one week of contract signing. Once agreed by all stakeholders, the implementation activities should commence immediately.</td>
<td></td>
</tr>
<tr>
<td>2. Five (5) Progress Reports over the one-year period: (3 Quarter Progress Reports, 1 Annual Progress Report, and 1 Final Project Report).</td>
<td>As agreed in the Implementation Plan</td>
</tr>
<tr>
<td>Each progress report\textsuperscript{11} should provide, at minimum, the below information:</td>
<td></td>
</tr>
<tr>
<td>a. Progress against output, sub-output, outcome indicators, and lessons learned</td>
<td></td>
</tr>
<tr>
<td>b. Activity Design, Activity Reports and List of activities undertaken in each component, including photo documentation.</td>
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<tr>
<td>c. Activities undertaken under the communication and knowledge management component</td>
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<tr>
<td>d. Resources utilization mapping</td>
<td></td>
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<tr>
<td>e. Financial expenses report</td>
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<tr>
<td>f. Any adjustment (from the initially agreed implementation plan) for the future implementation</td>
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<tr>
<td>g. any challenges faced during implementation and</td>
<td></td>
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<tr>
<td>h. mitigation plan for future challenges</td>
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<tr>
<td>3. Ten (10) SEs supported under the Entrepreneurship component</td>
<td>As agreed in the Implementation Plan</td>
</tr>
<tr>
<td>a. Complete documentation of all the activities undertaken for the Entrepreneurship component</td>
<td></td>
</tr>
<tr>
<td>b. Detailed report of the support provided to selected SEs. The firm will provide separate documentation of the facilitation of SEs’ access to external financing.</td>
<td></td>
</tr>
</tbody>
</table>

\textsuperscript{11} Progress Report Template to be provided to the winning bidder
4. Project Completion and Final Financial Report and turnover of all documents and resources used for the Entrepreneurship component

April 1, 2023

F. Key Performance Indicators and Service Level

1. Timely delivery of quality outputs according to the timetable.
   - Delays due to factors beyond the Firm’s control should be reported to the ISIP Project Manager two (2) weeks before the deadline as specified in the contract and the Terms of Reference.
   - In case of timeline revisions, ISIP Project Manager and the Firm will agree on new dates of output submission.

2. Effective communication and collaboration with UNDP and project stakeholders.

3. Effective use of methodologies appropriate to the engagement, including introduction of innovative tools and techniques.

4. Inclusiveness of engagement with stakeholders during the design and implementation of the outputs (contractor must be able to secure a broad audience/participation from stakeholders in all activities)

5. If the Firm fails to meet UNDP’s performance requirement:
   - Firm receives a warning to improve their performance in the first instance.
   - Firm will be given a total of three instances to improve.
   - Continued failure to meet performance and workplan targets may result in the cancellation/termination of contract.
   - Performance feedback will be shared by the ISIP Project Manager with the Firm when issues are observed. Otherwise, feedback is given every quarter as part of its contract management and checking-up on the health of its project.

G. Facilities to be Provided by UNDP

UNDP will provide the cloud-based platform where the Firm can upload all required deliverables and relevant reference documents. The UNDP ISIP Project will provide support and assistance in securing the necessary endorsement letters for coordinating with relevant parties for collaboration and partnership, managing stakeholders, and coordinating with the Steering Committee.

H. Governance and Accountability

Under Direct Implementation Modality, UNDP Philippines will have overall accountability for the ISIP project. The Firm shall report directly to the UNDP ISIP Project Manager, who shall manage day to day project activities and report to the Programme Team and the Steering Committee.

All reports shall be submitted to UNDP ISIP Project Manager for review and comments. Upon clearance, these will be certified by the Programme Analyst and Team Leader of the Institutions and Partnerships Programme Team of UNDP for payment. The project will be audited in accordance with UNDP’s standard auditing procedures.

The estimated lead time for review of outputs by UNDP is one week. It is advisable to consider this timeline when proposing the schedule.

The Project Steering Committee co-chaired by UNDP Philippines shall be responsible for management decisions beyond the Firm’s scope, such as, approval and revisions of project plans and budgets.
I. Expected Duration of the Contract

The work shall be undertaken over a period of 11 months following the timetable outlined in Section E above. The target start of work date is 1 May 2022 with contract end date on 1 April 2023.

J. Location of Work

The ISIP Project is based in Mandaluyong City, Metro Manila. The Bidder or its partner (as part of a joint venture, consortium, or association or as a subcontractor) must have a local office and presence in the Philippines and must be able to work in and travel to BARMM, Davao, Cagayan de Oro, and General Santos City.

K. Professional Qualifications of the Successful Firm and its Key Personnel

1. The Bidder or its partner (as part of a Joint Venture/Consortium/Association or as a Subcontractor) shall either be a non-profit institution (e.g., academic institutions and other non-government organizations) or a commercial firm (e.g., management consulting companies, research outfits, etc.) duly registered to conduct business in the Philippines. The Bidder shall have the following minimum qualifications:
   a. At least three (3) years of experience in incubation, acceleration, and fund management, with a track record of supporting sustainable development solutions addressing various socio-economic development issues
   b. Has implemented at least three (3) similar acceleration projects/programs in the country or in the ASEAN region, with demonstrated partnerships with the domestic and regional innovation and entrepreneurship ecosystem
   c. Has sector leadership and experience working in Mindanao, specifically with at least one (1) project or program implemented, doing coordination work and/or conducting acceleration and capacity building activities in the area. Project experience in BARMM is highly preferred.
   d. Has an existing network of partners in the enterprise support ecosystem, including in the financial sector.

2. The Firm should propose a minimum of three (3) team members for the project. Two personnel, a Social Entrepreneurship Manager and an Administrative and Finance Officer, is expected to render full-time level of effort, while the third member, a Social Entrepreneurship Advisor is expected to render part-time level of effort to the project. The corresponding qualifications and level of effort are outlined below:

   a. Social Entrepreneurship Manager (Level of effort: 242 person days)

      Education:
      ● University degree in business management, economics, sustainable development, or a related field

      Experience:
      ● At least three (3) years of progressively responsible professional experience in the following: business development, social enterprise incubation/acceleration, fund management, grant-making or grant management, program management, and networking and communication with the ability to develop effective partnerships across a broad range of stakeholders; has business/entrepreneurial/financial experience
      ● At least two (2) years of experience in designing and implementing incubation and acceleration programs, specifically performing hands-on business coaching/mentoring/advising to businesses, including start-ups

      Language:
• Demonstrated excellent written and verbal communication skills in English and Filipino. Knowledge of local languages in Mindanao is desirable.

b. Administrative and Finance Officer (Level of effort: 242 person days)

Education:
• University degree in Administration, finance, accounting, auditing, economics, business, or a Certified Public Accountant

Experience:
• At least three (3) years of progressively responsible professional experience in project administrative and financial management, accounting or auditing
• Extensive experience coordinating and working with counterparts at various levels of government and the private sector in similar projects

Language:
• Excellent written and verbal communication skills in English and Filipino. Knowledge of local languages in Mindanao is desirable.

c. Social Entrepreneurship Director (Level of effort: 121 person days)

Education:
• Advanced university degree in economics, business, finance, sustainable development, or a related field

Experience:
• At least seven (7) years of progressively responsible professional experience in the following: business development, social enterprise incubation/acceleration, fund management, grant-making or grant management, program management, and networking and communication with the ability to develop effective partnerships across a broad range of stakeholders; has business/entrepreneurial/financial experience
• At least three (3) years of experience in designing and implementing incubation and acceleration programs, specifically performing hands-on business coaching/mentoring/advising to businesses, including start-ups

Language:
• Demonstrated excellent written and verbal communication skills in English and Filipino. Knowledge of local languages in Mindanao is desirable.

3. Additional Members. Interested firms may include additional team members (i.e. monitoring and evaluation officer, communications officer, etc) that perform roles clearly supportive of the project team as articulated in the proposal. Excluding external consultants that may be tapped for specific components, the core team members for this TOR is not expected to exceed four personnel.

4. UNDP gives preference to firms who demonstrate the following values:
   a. Gender Equality – achieving gender equality and gender mainstreaming are fundamental principles and strategies of UN system agencies; therefore, UNDP encourages proposers to deploy staff and consultants (male/female) at a balanced ratio.
   b. Integrity – UNDP implements a zero-tolerance policy on unlawful practices, including fraud, corruption, collusion, and obstruction. UNDP is committed to preventing, identifying, and addressing all acts of fraud and corrupt practices against UNDP and third parties involved in UNDP activities. UNDP requires all proposers to conduct themselves in a professional, objective, and impartial manner. Proposers must strictly avoid conflicts with other assignments or their interests and act without consideration for future work. UNDP
reserves the right to reject proposers who are in conflict of interest or have been involved in unethical practices.

L. Scope of Price Proposal and Schedule of Payments

The contract price shall be based on fixed price for professional fees and other resources as required for the project, and reimbursement for other components such as activities, travel, events as proposed by the Firm and agreed on by UNDP. The project duration is 11 months and there is no possibility of extension as of now. The project should be able to achieve all deliverables as per the ToR in the specified 11 months duration.

1. The following components should be included, as a minimum, in the financial proposal:
   
   **Fixed Price:**
   a. Professional fees/salaries/honoraria of the core project team (level of effort/number of person days per key personnel must be indicated)
   b. Management and operational fees
   
   **Cost reimbursement:**
   c. Other professional fees and salaries of consultants or ad-hoc resources (with level of effort/number of person days)
   d. Travel, lodging, and allowances for fieldwork
   e. Communication, workshops, meetings
   f. Materials, reproduction, subscriptions
   g. Others as may be relevant to the scope of work

   *Please note that any assets to be procured for this project by the firm will have to be handed over to UNDP once the project has been completed. A list of these assets should be included in the financial proposal.

2. Payments shall be made upon acceptance of invoice for fixed and variable components of the contract. For variable components, the Firm needs to submit details of activities for each deliverable through quarterly progress and financial reports. Payments will be made upon written acceptance of deliverables by UNDP ISIP project manager.

Except for the deliverables under the Inception Phase, activities and outputs listed below are only indicative and may be adjusted according to implementation plan proposed by winning bidder and agreed by UNDP during the Inception Phase.

<table>
<thead>
<tr>
<th>Period</th>
<th>Deliverables/ Outputs</th>
<th>Target Due Dates</th>
<th>Payments (**Percentage of total contract amount)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inception</td>
<td>Upon submission and acceptance of an inception report with a detailed implementation plan and the communications and advocacy plan</td>
<td>Within one week after contract signing</td>
<td>20%</td>
</tr>
<tr>
<td><strong>Midstream</strong></td>
<td><strong>Selection and Onboarding of 10 SEs.</strong></td>
<td><strong>30 June 2022</strong></td>
<td><strong>10%</strong></td>
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<tr>
<td></td>
<td>Upon submission and acceptance of the support provided to UNDP in Due Diligence/Risk Assessment for the selected SEs, Baseline Assessment of SE capacities report, SE profiles, and Quarter Progress Report</td>
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<tr>
<td></td>
<td>Conduct of Social Impact Accelerator Learning Session (at least one); and Upon submission and acceptance of the Social Impact Accelerator Program and Deployment Plan (Topics on investment conversations, change management, financial management, business development, community engagement, managing team dynamics, impact measurement and management, grant proposal writing, perfect pitch, and Design Sprints for Rapid Business Innovation)</td>
<td><strong>30 July 2022</strong></td>
<td><strong>10%</strong></td>
</tr>
<tr>
<td></td>
<td>Successfully matched mentors and conduct of at least one mentoring session for each onboarded SE</td>
<td><strong>30 August 2022</strong></td>
<td><strong>10%</strong></td>
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<td>Upon submission and acceptance of activity documents</td>
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<td></td>
<td>Conduct of at least half of the tailored SEs support services (support services may include legal assistance, financial services, communications support, intellectual property rights, business development, and appropriate technologies)</td>
<td><strong>30 September 2022</strong></td>
<td><strong>10%</strong></td>
</tr>
<tr>
<td></td>
<td>Upon submission and acceptance of activity documentations, and quarter progress report</td>
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<td></td>
<td>Conduct of community events/roundtable discussion/meeting with investors (at least one)</td>
<td><strong>30 November 2022</strong></td>
<td><strong>10%</strong></td>
</tr>
<tr>
<td></td>
<td>Upon submission and acceptance of activity documentations</td>
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<tr>
<td>Task Description</td>
<td>Due Date</td>
<td>Percentage</td>
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<td>---------------------------------------------------------------------------------</td>
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<tr>
<td>Completed Demo Day/SE showcase to investors</td>
<td>30 December 2022</td>
<td>10%</td>
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<tr>
<td>Upon submission and acceptance of activity documentation, and annual progress report</td>
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<td></td>
<td></td>
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<tr>
<td>Completion of all Entrepreneurship component activities:</td>
<td>30 January 2023</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>a. Social Impact Accelerator program, including all learning sessions and community events</td>
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<tr>
<td>b. Tailored support services</td>
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<tr>
<td>c. Mentoring sessions</td>
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<td></td>
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<tr>
<td>Upon submission and acceptance of activity documentation</td>
<td>1 April 2023</td>
<td>10%</td>
<td></td>
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<tr>
<td><strong>Completion</strong></td>
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<tr>
<td>Upon submission and acceptance of the following:</td>
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</tr>
<tr>
<td>a. Documentation report for the support to SEs including activity documentation, M&amp;E milestones reports, lessons learned, and final report</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Quarter progress report, and a Project-end and assessment reports, with a detailed documentation of all activities undertaken under the Entrepreneurship components submitted and accepted by UNDP</td>
<td></td>
<td></td>
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<tr>
<td>c. All documents and resources used for the Education and Entrepreneurship components turned over to UNDP</td>
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</tbody>
</table>

UNDP will require Quarterly Progress Reports, and templates will be finalized during Inception Phase.

**Percentages indicated above may be adjusted according to the inception report; and if required, during the course of implementation.**
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:**

<table>
<thead>
<tr>
<th>Have you duly completed all the Returnable Bidding Forms?</th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ Form A: Technical Proposal Submission Form ☐</td>
</tr>
<tr>
<td>▪ Form B: Bidder Information Form ☐</td>
</tr>
<tr>
<td>▪ Form C: Joint Venture/Consortium/ Association Information Form ☐</td>
</tr>
<tr>
<td>▪ Form D: Qualification Form ☐</td>
</tr>
<tr>
<td>▪ Form E: Format of Technical Proposal ☐</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Have you provided the required documents to establish compliance with the evaluation criteria in Section 4?</th>
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<tbody>
<tr>
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</table>

**Financial Proposal Envelope**  
*(Must be submitted in a separate password protected file)*

<table>
<thead>
<tr>
<th>Have you duly completed all the Returnable Bidding Forms?</th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ Form F: Financial Proposal Submission Form ☐</td>
</tr>
<tr>
<td>▪ Form G: Financial Proposal Form ☐</td>
</tr>
</tbody>
</table>
FORM A: TECHNICAL PROPOSAL SUBMISSION FORM

Name of Bidder: [Insert Name of Bidder]  
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

<table>
<thead>
<tr>
<th><strong>Legal name of Bidder</strong></th>
<th>[Complete]</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Legal address</strong></td>
<td>[Complete]</td>
</tr>
<tr>
<td><strong>Year of registration</strong></td>
<td>[Complete]</td>
</tr>
</tbody>
</table>
| **Bidder’s Authorized Representative Information** | Name and Title: [Complete]  
Telephone numbers: [Complete]  
Email: [Complete] |
| **Are you a UNGM registered vendor?** | ☐ Yes  ☐ No  If yes, [insert UGNM vendor number] |
| **Are you a UNDP vendor?** | ☐ Yes  ☐ No  If yes, [insert UNDP vendor number] |
| **Countries of operation** | [Complete] |
| **No. of full-time employees** | [Complete] |
| **Quality Assurance Certification (e.g. ISO 9000 or Equivalent)** (If yes, provide a Copy of the valid Certificate): | [Complete] |
| **Does your Company hold any accreditation such as ISO 14001 related to the environment?** (If yes, provide a Copy of the valid Certificate): | [Complete] |
| **Does your Company have a written Statement of its Environmental Policy?** (If yes, provide a Copy) | [Complete] |
| **Contact person UNDP may contact for requests for clarification during Proposal evaluation** | Name and Title: [Complete]  
Telephone numbers: [Complete]  
Email: [Complete] |

**Please attach the following documents:**
- **Company Profile**, which should **not** exceed fifteen (15) pages, including printed brochures and product catalogues relevant to the goods/services being procured
- **Certificate of Incorporation/ Business Registration**
- **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
- **Trade name registration papers, if applicable**
- **Local Government permit to locate and operate in assignment location, if applicable**
- **Official Letter of Appointment as local representative, if Bidder is submitting a Bid in behalf of an entity located outside the country**
- **Power of Attorney**
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.

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

Name of leading partner (with authority to bind the JV, Consortium, Association during the RFP process and, in the event a Contract is awarded, during contract execution) [Complete]

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:

☐ Notarized Letter of intent to form a joint venture  OR  ☐ Notarized 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

<table>
<thead>
<tr>
<th>Year</th>
<th>Non-performed portion of contract</th>
<th>Contract Identification</th>
<th>Total Contract Amount (current value in US$)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Name of Client:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Address of Client:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reason(s) for non-performance:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Litigation History (including pending litigation)

☐ No litigation history for the last 3 years
☐ Litigation History as indicated below

<table>
<thead>
<tr>
<th>Year of dispute</th>
<th>Amount in dispute (in US$)</th>
<th>Contract Identification</th>
<th>Total Contract Amount (current value in US$)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Name of Client:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Address of Client:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Matter in dispute:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Party who initiated the dispute:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Status of dispute:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Party awarded if resolved:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Previous Relevant Experience

Please list only previous similar 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.
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

<table>
<thead>
<tr>
<th>Annual Turnover for the last 3 years</th>
<th>Year</th>
<th>USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year</td>
<td>USD</td>
<td></td>
</tr>
<tr>
<td>Year</td>
<td>USD</td>
<td></td>
</tr>
<tr>
<td>Year</td>
<td>USD</td>
<td></td>
</tr>
</tbody>
</table>

Latest Credit Rating (if any), indicate the source

Financial information (in US$ equivalent) | Historic information for the last 3 years

<table>
<thead>
<tr>
<th>Information from Balance Sheet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year 1</td>
</tr>
<tr>
<td>Year 2</td>
</tr>
<tr>
<td>Year 3</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Information from Income Statement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Assets (TA)</td>
</tr>
<tr>
<td>Total Liabilities (TL)</td>
</tr>
<tr>
<td>Current Assets (CA)</td>
</tr>
<tr>
<td>Current Liabilities (CL)</td>
</tr>
<tr>
<td>Total / Gross Revenue (TR)</td>
</tr>
<tr>
<td>Profits Before Taxes (PBT)</td>
</tr>
<tr>
<td>Net Profit</td>
</tr>
<tr>
<td>Current Ratio</td>
</tr>
</tbody>
</table>

☐ Attached are copies of the **audited financial statements for 2018, 2019 and 2020** (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.
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 Understanding of the requirement and the strategy presented as indicated in this TOR: 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?

2.2 Description of the Offeror’s approach, methodology, and tools for meeting or exceeding the requirements of the Terms of Reference is backed by the Firm’s past and successful experience of having applied the same in relevant past projects;

2.3 Feasibility of the implementation plan proposed including whether the activities are properly sequenced, logical, and realistic assumptions are clearly defined and levels of effort of personnel to be assigned are appropriate to ensure quality of outputs.

2.4 The methodology shall also include details of the Bidder’s internal technical and quality assurance review mechanisms.

2.5 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.

2.6 Description of available performance monitoring and evaluation mechanisms and tools; how they shall be adopted and used for a specific requirement.

2.7 Implementation plan including a Gantt Chart or Project Schedule indicating the detailed sequence of activities that will be undertaken and their corresponding timing.

---

<table>
<thead>
<tr>
<th>Name of Bidder:</th>
<th>[Insert Name of Bidder]</th>
<th>Date:</th>
<th>Select date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP reference:</td>
<td>[Insert RFP Reference Number]</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
2.8 Demonstrate how you plan to integrate sustainability measures in the execution of the contract.

2.9 Understanding of the requirement and the strategy presented as indicated in this TOR: 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?

2.10 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

<table>
<thead>
<tr>
<th>Name of Personnel</th>
<th>[Insert]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position for this assignment</td>
<td>[Insert]</td>
</tr>
<tr>
<td>Nationality</td>
<td>[Insert]</td>
</tr>
<tr>
<td>Language proficiency</td>
<td>[Insert]</td>
</tr>
<tr>
<td>Education/ Qualifications</td>
<td>[Summarize college/university and other specialized education of personnel member, giving names of schools, dates attended, and degrees/qualifications obtained.]</td>
</tr>
<tr>
<td>Professional certifications</td>
<td>[Provide details of professional certifications relevant to the scope of services]</td>
</tr>
<tr>
<td>Employment Record/Experience</td>
<td>[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.]</td>
</tr>
</tbody>
</table>

- Name of institution: [Insert]
- Date Employment: [To:] [From:]
- Position: [Insert]
- Description of activities/functions performed: [Insert]

- Name of institution: [Insert]
- Date Employment: [To:] [From:]
- Position: [Insert]
- Description of activities/functions performed: [Insert]

- Name of institution: [Insert]
- Date Employment: [To:] [From:]
- Position: [Insert]
- Description of activities/functions performed: [Insert]

<table>
<thead>
<tr>
<th>References</th>
<th>Reference 1: [Insert]</th>
</tr>
</thead>
<tbody>
<tr>
<td>References</td>
<td>Reference 2: [Insert]</td>
</tr>
</tbody>
</table>
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.

________________________________________ ___________________
Signature of Personnel                Date (Day/Month/Year)
FORM F: FINANCIAL PROPOSAL SUBMISSION FORM
(Must be submitted in a separate password protected file)

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  
(Must be submitted in a separate password protected file)

<table>
<thead>
<tr>
<th>Name of Bidder:</th>
<th>[Insert Name of Bidder]</th>
<th>Date:</th>
<th>Select date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP reference:</td>
<td>[Insert RFP Reference Number]</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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**  
**EXCLUSIVE of VAT and other applicable direct taxes**

<table>
<thead>
<tr>
<th></th>
<th>Amount(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Fees (from Table 2)</td>
<td></td>
</tr>
<tr>
<td>Other Costs (from Table 3)</td>
<td></td>
</tr>
<tr>
<td>Total Amount of Financial Proposal</td>
<td></td>
</tr>
</tbody>
</table>

**Table 2: Breakdown of Professional Fees/Salaries/ honoraria of core project team:**

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Fee Rate</th>
<th>No. of Days/ months/ hours</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>A</td>
<td>C=A+B</td>
</tr>
<tr>
<td>In-Country</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home Based</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Any other cost for fixed price payment linked to deliverables</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Management and</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Table 3: Breakdown of Other Costs (for reimbursement as per actuals)

<table>
<thead>
<tr>
<th>Description</th>
<th>UOM</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other professional fees and salaries of consultants or ad-hoc resources</td>
<td>Day</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subsistence allowance</td>
<td>Day</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Miscellaneous travel expenses</td>
<td>Trip</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local transportation costs/ allowances for field work</td>
<td>Lump Sum</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communication, workshops, meetings</td>
<td>Each</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Materials, reproduction, subscriptions</td>
<td>Lump sum</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Costs: (please specify)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Subtotal Other Costs:**

Table 4: Breakdown of Price per Deliverable/Activity

<table>
<thead>
<tr>
<th>Deliverable/Activity description</th>
<th>Time (person days)</th>
<th>Professional Fees</th>
<th>Other Costs</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deliverable 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deliverable 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deliverable 3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>.....</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>