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REQUEST FOR PROPOSAL

Development of a Financing Instrument for System Finance

RFP No.: UNDP/BPPS/GPN/SIU/RFP/2022/3946

Project: Innovation Facility 2.0

Country: Global

Issued on: 14 July 2022

Contents

Section 1. Letter of Invitation	4
Section 2. Instruction to Bidders	5
A. GENERAL PROVISIONS 5	
1. Introduction	5
2. Fraud & Corruption, Gifts and Hospitality	5
3. Eligibility	5
4. Conflict of Interests	5
B. PREPARATION OF PROPOSALS 6	
5. General Considerations	6
6. Cost of Preparation of Proposal	6
7. Language	6
8. Documents Comprising the Proposal	6
9. Documents Establishing the Eligibility and Qualifications of the Bidder	6
10. Technical Proposal Format and Content	7
11. Financial Proposals	7
12. Proposal Security	7
13. Currencies	7
14. Joint Venture, Consortium or Association	8
15. Only One Proposal	8
16. Proposal Validity Period	9
17. Extension of Proposal Validity Period	9
18. Clarification of Proposal	9
19. Amendment of Proposals	9
20. Alternative Proposals	9
21. Pre-Bid Conference	10
C. SUBMISSION AND OPENING OF PROPOSALS 10	
22. Submission	10
23. Deadline for Submission of Proposals and Late Proposals	11
24. Withdrawal, Substitution, and Modification of Proposals	11
25. Proposal Opening	12
D. EVALUATION OF PROPOSALS 12	
26. Confidentiality	12
27. Evaluation of Proposals	12
28. Preliminary Examination	12
29. Evaluation of Eligibility and Qualification	12
30. Evaluation of Technical and Financial Proposals	13
31. Due Diligence	13
32. Clarification of Proposals	14

33. Responsiveness of Proposal.....	14
34. Nonconformities, Reparable Errors and Omissions	14
E. AWARD OF CONTRACT	14
35. Right to Accept, Reject, Any or All Proposals.....	14
36. Award Criteria	15
37. Debriefing.....	15
38. Right to Vary Requirements at the Time of Award.....	15
39. Contract Signature	15
40. Contract Type and General Terms and Conditions	15
41. Performance Security	15
42. Bank Guarantee for Advanced Payment	15
43. Liquidated Damages	15
44. Payment Provisions	15
45. Vendor Protest	16
46. Other Provisions	16
Section 3. Bid Data Sheet	17
Section 4. Evaluation Criteria	20
Section 5. Terms of Reference.....	24
Section 6: Returnable Bidding Forms / Checklist.....	30
form a: technical proposal submission form.....	31
form b: bidder information form.....	32
form c: joint venture/consortium/association information form.....	33
form d: qualification form.....	33
form e: format of technical proposal.....	36
form f: financial proposal submission form.....	39
form g: financial proposal form	1
form h: form of proposal security	Error! Bookmark not defined.

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 Ida cpu.bids@undp.org c.c. Uusikyla ida.uusikyla@undp.org indicating whether you intend to submit a Proposal or otherwise. 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:

DocuSigned by:

Birhanu Gebeyaw

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Name: Birhanu Degu Gebeyaw

Title: Procurement consultant

Date: **July 14, 2022**

Approved by:

DocuSigned by:

Ali Tahsin Jumah

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Name: Ali Tahsin Jumah

Title: Chief, Central Procurement Unit

Date: **July 14, 2022**

SECTION 2. INSTRUCTION TO BIDDERS

A. GENERAL PROVISIONS	
1. Introduction	<p>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</p> <p>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.</p> <p>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.</p>
2. Fraud & Corruption, Gifts and Hospitality	<p>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</p> <p>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.</p> <p>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.</p> <p>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</p>
3. Eligibility	<p>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.</p> <p>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.</p>
4. Conflict of Interests	<p>4.1 Bidders must strictly avoid conflicts with other assignments or their own interests, and act without consideration for future work. Bidders found to have a conflict of interest shall be disqualified. Without limitation on the generality of the above, Bidders, and any of their affiliates, shall be considered to have a conflict of interest with one or more parties in this solicitation process, if they:</p>

	<p>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;</p> <p>b) Were involved in the preparation and/or design of the programme/project related to the services requested under this RFP; or</p> <p>c) Are found to be in conflict for any other reason, as may be established by, or at the discretion of UNDP.</p> <p>4.2 In the event of any uncertainty in the interpretation of a potential conflict of interest, Bidders must disclose to UNDP, and seek UNDP's confirmation on whether or not such a conflict exists.</p> <p>4.3 Similarly, the Bidders must disclose in their proposal their knowledge of the following:</p> <p>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</p> <p>b) All other circumstances that could potentially lead to actual or perceived conflict of interest, collusion or unfair competition practices.</p> <p>Failure to disclose such an information may result in the rejection of the proposal or proposals affected by the non-disclosure.</p> <p>4.4 The eligibility of Bidders that are wholly or partly owned by the Government shall be subject to UNDP's further evaluation and review of various factors such as being registered, operated and managed as an independent business entity, the extent of Government ownership/share, receipt of subsidies, mandate and access to information in relation to this RFP, among others. Conditions that may lead to undue advantage against other Bidders may result in the eventual rejection of the Proposal.</p>
B. PREPARATION OF PROPOSALS	
5. <i>General Considerations</i>	<p>5.1 In preparing the Proposal, the Bidder is expected to examine the RFP in detail. Material deficiencies in providing the information requested in the RFP may result in rejection of the Proposal.</p> <p>5.2 The Bidder will not be permitted to take advantage of any errors or omissions in the RFP. Should such errors or omissions be discovered, the Bidder must notify the UNDP</p>
6. <i>Cost of Preparation of Proposal</i>	<p>6.1 The Bidder shall bear any and all costs related to the preparation and/or submission of the Proposal, regardless of whether its Proposal was selected or not. UNDP shall not be responsible or liable for those costs, regardless of the conduct or outcome of the procurement process.</p>
7. <i>Language</i>	<p>7.1 The Proposal, as well as any and all related correspondence exchanged by the Bidder and UNDP, shall be written in the language (s) specified in the BDS.</p>
8. <i>Documents Comprising the Proposal</i>	<p>8.1 The Proposal shall comprise of the following documents:</p> <p>a) Documents Establishing the Eligibility and Qualifications of the Bidder;</p> <p>b) Technical Proposal;</p> <p>c) Financial Proposal;</p> <p>d) Any attachments and/or appendices to the Proposal.</p>
9. <i>Documents Establishing the</i>	<p>9.1 The Bidder shall furnish documentary evidence of its status as an eligible and qualified vendor, using the Forms provided under Section 6</p>

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

	<ul style="list-style-type: none"> 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.
<p>14. Joint Venture, Consortium or Association</p>	<p>14.1 If the Bidder is a group of legal entities that will form or have formed a Joint Venture (JV), Consortium or Association for the Proposal, they shall confirm in their Proposal that : (i) they have designated one party to act as a lead entity, duly vested with authority to legally bind the members of the JV, Consortium or Association jointly and severally, which shall be evidenced by a duly notarized Agreement among the legal entities, and submitted with the Proposal; and (ii) if they are awarded the contract, the contract shall be entered into, by and between UNDP and the designated lead entity, who shall be acting for and on behalf of all the member entities comprising the joint venture.</p> <p>14.2 After the Deadline for Submission of Proposal, the lead entity identified to represent the JV, Consortium or Association shall not be altered without the prior written consent of UNDP.</p> <p>14.3 The lead entity and the member entities of the JV, Consortium or Association shall abide by the provisions of Clause 9 herein in respect of submitting only one proposal.</p> <p>14.4 The description of the organization of the JV, Consortium or Association must clearly define the expected role of each of the entity in the joint venture in delivering the requirements of the RFP, both in the Proposal and the JV, Consortium or Association Agreement. All entities that comprise the JV, Consortium or Association shall be subject to the eligibility and qualification assessment by UNDP.</p> <p>14.5 A JV, Consortium or Association in presenting its track record and experience should clearly differentiate between:</p> <ul style="list-style-type: none"> 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. <p>14.6 Previous contracts completed by individual experts working privately but who are permanently or were temporarily associated with any of the member firms cannot be claimed as the experience of the JV, Consortium or Association or those of its members, but should only be claimed by the individual experts themselves in their presentation of their individual credentials.</p> <p>14.7 JV, Consortium or Associations are encouraged for high value, multi-sectoral requirements when the spectrum of expertise and resources required may not be available within one firm.</p>
<p>15. Only One Proposal</p>	<p>15.1 The Bidder (including the individual members of any Joint Venture) shall submit only one Proposal, either in its own name or as part of a Joint Venture.</p> <p>15.2 Proposals submitted by two (2) or more Bidders shall all be rejected if they are found to have any of the following:</p> <ul style="list-style-type: none"> e) they have at least one controlling partner, director or shareholder in common; or

	<p>f) any one of them receive or have received any direct or indirect subsidy from the other/s; or</p> <p>g) they have the same legal representative for purposes of this RFP; or</p> <p>h) 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;</p> <p>i) 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</p> <p>j) some key personnel proposed to be in the team of one Bidder participates in more than one Proposal received for this RFP process. This condition relating to the personnel, does not apply to subcontractors being included in more than one Proposal.</p>
16. <i>AAProposal Validity Period</i>	<p>16.1 Proposals shall remain valid for the period specified in the BDS, commencing on the Deadline for Submission of Proposals. A Proposal valid for a shorter period may be rejected by UNDP and rendered non-responsive.</p> <p>16.2 During the Proposal validity period, the Bidder shall maintain its original Proposal without any change, including the availability of the Key Personnel, the proposed rates and the total price.</p>
17. <i>Extension of Proposal Validity Period</i>	<p>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.</p> <p>17.2 If the Bidder agrees to extend the validity of its Proposal, it shall be done without any change in the original Proposal.</p> <p>17.3 The Bidder has the right to refuse to extend the validity of its Proposal, and in which case, such Proposal will not be further evaluated.</p>
18. <i>Clarification of Proposal</i>	<p>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.</p> <p>18.2 UNDP will provide the responses to clarifications through the method specified in the BDS.</p> <p>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.</p>
19. <i>Amendment of Proposals</i>	<p>19.1 At any time prior to the deadline of Proposal submission, UNDP may for any reason, such as in response to a clarification requested by a Bidder, modify the RFP in the form of an amendment to the RFP. Amendments will be made available to all prospective bidders.</p> <p>19.2 If the amendment is substantial, UNDP may extend the Deadline for submission of proposal to give the Bidders reasonable time to incorporate the amendment into their Proposals.</p>
20. <i>Alternative Proposals</i>	<p>20.1 Unless otherwise specified in the BDS, alternative proposals shall not be considered. If submission of alternative proposal is allowed by BDS, a Bidder may submit an alternative proposal, but only if it also submits a proposal conforming to the RFP requirements. UNDP shall only consider the alternative proposal offered by the Bidder whose conforming proposal ranked the highest as per the</p>

	<p>specified evaluation method. Where the conditions for its acceptance are met, or justifications are clearly established, UNDP reserves the right to award a contract based on an alternative proposal.</p> <p>20.2 If multiple/alternative proposals are being submitted, they must be clearly marked as "Main Proposal" and "Alternative Proposal"</p>
21. Pre-Bid Conference	<p>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.</p>
C. SUBMISSION AND OPENING OF PROPOSALS	
22. Submission	<p>22.1 The Bidder shall submit a duly signed and complete Proposal comprising the documents and forms in accordance with the requirements in the BDS. The submission shall be in the manner specified in the BDS.</p> <p>22.2 The Proposal shall be signed by the Bidder or person(s) duly authorized to commit the Bidder. The authorization shall be communicated through a document evidencing such authorization issued by the legal representative of the bidding entity, or a Power of Attorney, accompanying the Proposal.</p> <p>22.3 Bidders must be aware that the mere act of submission of a Proposal, in and of itself, implies that the Bidder fully accepts the UNDP General Contract Terms and Conditions.</p>
Hard copy (manual) submission	<p>22.4 Hard copy (manual) submission by courier or hand delivery allowed or specified in the BDS shall be governed as follows:</p> <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> i. Bear the name and address of the bidder; ii. Be addressed to UNDP as specified in the BDS iii. Bear a warning that states "<i>Not to be opened before the time and date for proposal opening</i>" as specified in the BDS. <p>If the envelopes and packages with the Proposal are not sealed and marked as required, UNDP shall assume no responsibility for the misplacement, loss, or premature opening of the Proposal.</p>
Email Submission	<p>22.5 Email submission, if allowed or specified in the BDS, shall be governed as follows:</p>

<p>eTendering submission</p>	<ul style="list-style-type: none"> 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. <p>22.6 Electronic submission through eTendering, if allowed or specified in the BDS, shall be governed as follows:</p> <ul style="list-style-type: none"> 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: https://www.undp.org/content/undp/en/home/procurement/business/resources-for-bidders
<p>23. <i>Deadline for Submission of Proposals and Late Proposals</i></p>	<p>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</p> <p>23.2 UNDP shall not consider any Proposal that is submitted after the deadline for the submission of Proposals.</p>
<p>24. <i>Withdrawal, Substitution, and Modification of Proposals</i></p>	<p>24.1 A Bidder may withdraw, substitute or modify its Proposal after it has been submitted at any time prior to the deadline for submission.</p> <p>24.2 Manual and Email submissions: A bidder may withdraw, substitute or modify its Proposal by sending a written notice to UNDP, duly signed by an authorized representative, and shall include a copy of the authorization (or a Power of Attorney). The corresponding substitution or modification of the Proposal, if any, must accompany the respective written notice. All notices must be submitted in the same manner as specified for submission of proposals, by clearly marking them as "WITHDRAWAL," "SUBSTITUTION," or "MODIFICATION"</p> <p>24.3 eTendering: A Bidder may withdraw, substitute or modify its Proposal by Canceling, Editing, and re-submitting the proposal directly in the system. It is the responsibility of the Bidder to properly follow the system instructions, duly edit and submit a substitution or modification of the Proposal as needed. Detailed instructions on how to cancel or modify a Proposal directly in the</p>

	<p>system are provided in Bidder User Guide and Instructional videos.</p> <p>24.4 Proposals requested to be withdrawn shall be returned unopened to the Bidders (only for manual submissions), except if the bid is withdrawn after the bid has been opened</p>
25. <i>Proposal Opening</i>	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. <i>Confidentiality</i>	<p>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.</p> <p>26.2 Any effort by a Bidder or anyone on behalf of the Bidder to influence UNDP in the examination, evaluation and comparison of the Proposals or contract award decisions may, at UNDP's decision, result in the rejection of its Proposal and may be subject to the application of prevailing UNDP's vendor sanctions procedures.</p>
27. <i>Evaluation of Proposals</i>	<p>27.1 The Bidder is not permitted to alter or modify its Proposal in any way after the proposal submission deadline except as permitted under Clause 24 of this RFP. UNDP will conduct the evaluation solely on the basis of the submitted Technical and Financial Proposals.</p> <p>27.2 Evaluation of proposals is made of the following steps:</p> <ol style="list-style-type: none"> Preliminary Examination Minimum Eligibility and Qualification (if pre-qualification is not done) Evaluation of Technical Proposals Evaluation of Financial Proposals
28. <i>Preliminary Examination</i>	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. <i>Evaluation of Eligibility and Qualification</i>	<p>29.1 Eligibility and Qualification of the Bidder will be evaluated against the Minimum Eligibility/Qualification requirements specified in the Section 4 (Evaluation Criteria).</p> <p>29.2 In general terms, vendors that meet the following criteria may be considered qualified:</p> <ol style="list-style-type: none"> 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; They have a good financial standing and have access to adequate financial resources to perform the contract and all existing commercial commitments, 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; They are able to comply fully with UNDP General Terms and Conditions of Contract; 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. <i>Evaluation of Technical and Financial Proposals</i>	<p>30.1 The evaluation team shall review and evaluate the Technical Proposals on the basis of their responsiveness to the Terms of Reference and other RFP documents, applying the evaluation criteria, sub-criteria, and point system specified in the Section 4 (Evaluation Criteria). A Proposal shall be rendered non-responsive at the technical evaluation stage if it fails to achieve the minimum technical score indicated in the BDS. When necessary and if stated in the BDS, UNDP may invite technically responsive bidders for a presentation related to their technical proposals. The conditions for the presentation shall be provided in the bid document where required.</p> <p>30.2 In the second stage, only the Financial Proposals of those Bidders who achieve the minimum technical score will be opened for evaluation. The Financial Proposals corresponding to Technical Proposals that were rendered non-responsive shall remain unopened, and, in the case of manual submission, be returned to the Bidder unopened. For emailed Proposals and e-tendering submissions, UNDP will not request for the password of the Financial Proposals of bidders whose Technical Proposal were found not responsive.</p> <p>30.3 The evaluation method that applies for this RFP shall be as indicated in the BDS, which may be either of two (2) possible methods, as follows: (a) the lowest priced method which selects the lowest evaluated financial proposal of the technically responsive Bidders; or (b) the combined scoring method which will be based on a combination of the technical and financial score.</p> <p>30.4 When the BDS specifies a combined scoring method, the formula for the rating of the Proposals will be as follows:</p> <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p><u>Rating the Technical Proposal (TP):</u></p> <p>TP Rating = (Total Score Obtained by the Offer / Max. Obtainable Score for TP) x 100</p> <p><u>Rating the Financial Proposal (FP):</u></p> <p>FP Rating = (Lowest Priced Offer / Price of the Offer Being Reviewed) x 100</p> <p><u>Total Combined Score:</u></p> <p>Combined Score = (TP Rating) x (Weight of TP, e.g. 70%) + (FP Rating) x (Weight of FP, e.g., 30%)</p> </div>
31. <i>Due Diligence</i>	<p>31.1 UNDP reserves the right to undertake a due diligence exercise, also called post qualification, aimed at determining to its satisfaction, the validity of the information provided by the Bidder. Such exercise shall be fully documented and may include, but need not be limited to, all or any combination of the following:</p> <ul style="list-style-type: none"> 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

	<p>previous works, as necessary;</p> <p>e) Physical inspection of the Bidder's offices, branches or other places where business transpires, with or without notice to the Bidder;</p> <p>f) Other means that UNDP may deem appropriate, at any stage within the selection process, prior to awarding the contract.</p>
32. <i>Clarification of Proposals</i>	<p>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.</p> <p>32.2 UNDP's request for clarification and the response shall be in writing and no change in the prices or substance of the Proposal shall be sought, offered, or permitted, except to provide clarification, and confirm the correction of any arithmetic errors discovered by UNDP in the evaluation of the Proposals, in accordance with RFP.</p> <p>32.3 Any unsolicited clarification submitted by a Bidder in respect to its Proposal, which is not a response to a request by UNDP, shall not be considered during the review and evaluation of the Proposals.</p>
33. <i>Responsiveness of Proposal</i>	<p>33.1 UNDP's determination of a Proposal's responsiveness will be based on the contents of the Proposal itself. A substantially responsive Proposal is one that conforms to all the terms, conditions, TOR and other requirements of the RFP without material deviation, reservation, or omission.</p> <p>33.2 If a Proposal is not substantially responsive, it shall be rejected by UNDP and may not subsequently be made responsive by the Bidder by correction of the material deviation, reservation, or omission.</p>
34. <i>Nonconformities, Reparable Errors and Omissions</i>	<p>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.</p> <p>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.</p> <p>34.3 For Financial Proposal that has been opened, UNDP shall check and correct arithmetical errors as follows:</p> <p>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;</p> <p>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</p> <p>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.</p> <p>34.4 If the Bidder does not accept the correction of errors made by UNDP, its Proposal shall be rejected.</p>
E. AWARD OF CONTRACT	
35. <i>Right to</i>	35.1 UNDP reserves the right to accept or reject any Proposal, to render any or all of

<i>Accept, Reject, Any or All Proposals</i>	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. <i>Award Criteria</i>	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. <i>Debriefing</i>	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. <i>Right to Vary Requirements at the Time of Award</i>	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. <i>Contract Signature</i>	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. <i>Contract Type and General Terms and Conditions</i>	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
41. <i>Performance Security</i>	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 within fifteen (15) days of the contract signature by both parties. Where a performance security is required, the receipt of the performance security by UNDP shall be a condition for rendering the contract effective.
42. <i>Bank Guarantee for Advanced Payment</i>	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 https://popp.undp.org/_layouts/15/WopiFrame.aspx?sourcedoc=/UNDP_POPP_DOCUMENT_LIBRARY/Public/PSU_Contract%20Management%20Payment%20and%20Taxes_Advanced%20Payment%20Guarantee%20Form.docx&action=default
43. <i>Liquidated Damages</i>	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.
44. <i>Payment</i>	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

<i>Provisions</i>	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.
<i>45. Vendor Protest</i>	<p>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:</p> <p>http://www.undp.org/content/undp/en/home/operations/procurement/business/protest-and-sanctions.html</p>
<i>46. Other Provisions</i>	<p>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.</p> <p>46.2 UNDP is entitled to receive the same pricing offered by the same Contractor in contracts with the United Nations and/or its Agencies. The UNDP General Terms and Conditions shall have precedence.</p> <p>46.3 The United Nations has established restrictions on employment of (former) UN staff who have been involved in the procurement process as per bulletin ST/SGB/2006/15</p> <p>http://www.un.org/en/ga/search/view_doc.asp?symbol=ST/SGB/2006/15&referer</p>

SECTION 3. BID DATA SHEET

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

BDS No.	Ref. to Section.2	Data	Specific Instructions / Requirements
1	7	Language of the Proposal	English
2		Submitting Proposals for Parts or sub-parts of the TOR (partial bids)	Not Allowed
3	20	Alternative Proposals	Shall not be considered
4	21	Pre-proposal conference	Will not be conducted
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	United States Dollar
11	31	Deadline for submitting requests for clarifications/ questions	10 days before the submission deadline Clarifications will be provided on rolling basis and last request for questions/clarifications should be submitted to UNDP no later than 10 days before the submission date
12	31	Contact Details for submitting clarifications/questions	Focal Person in UNDP: Birhanu Degu Gebeyaw/ Ida Uusikyla Central Procurement Unit (CPU), New York, N.Y. 10017 E-mail address: cpu.bids@undp.org c.c. ida.uusikyla@undp.org

13	18, 19 and 21	Manner of Disseminating Supplemental Information to the RFP and responses/clarifications to queries	Posted directly to eTendering (https://etendering.partneragencies.org) and UNDP Procurement Notices Website (https://procurement-notices.undp.org/))
14	23	Deadline for Submission	indicated in eTendering system Note that system time zone is in EST/EDT (New York) time zone.
14	22	Allowable Manner of Submitting Proposals	e-Tendering
15	22	Proposal Submission Address	Proposals should be submitted through the UNDP eTendering system: https://etendering.partneragencies.org <u>Event ID number: UNDP1- CPUP22-016</u>
16	22	Electronic submission (email or eTendering) requirements	<ul style="list-style-type: none"> ▪ 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. ▪ Technical proposal and financial proposals <u>must</u> be submitted in separate files ▪ Password for financial proposal <u>must not</u> be provided to UNDP until requested by UNDP ▪ Max. File Size per transmission: 5MB
17	27 36	Evaluation Method for the Award of Contract	Combined Scoring Method, using the 70%-30% distribution for technical and financial proposals respectively The minimum technical score required to pass is 70%.
18		Expected date for commencement of Contract	October 3, 2022 TBC
19		Maximum expected duration of contract	65 days
20	35	UNDP will award the contract to:	One Proposer Only
21	39	Type of Contract	Purchase Order and Contract for Goods and Services for UNDP http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html

22	39	UNDP Contract Terms and Conditions that will apply	UNDP General Terms and Conditions for Professional Services http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html
23		Other Information Related to the RFP	For regular updates on this RFP, please refer to the UNDP Procurement Notices website (https://procurement-notices.undp.org/view_notice.cfm?notice_id=93369) and UNDP eTendering System (https://etendering.partneragencies.org) Event ID number: UNDP1- CPUP22-016

SECTION 4. EVALUATION CRITERIA

Preliminary Examination Criteria

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

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

Minimum Eligibility and Qualification Criteria

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

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

Subject	Criteria	Document Submission requirement
ELIGIBILITY		
Legal Status	Vendor is a legally registered entity.	Form B: Bidder Information Form
Eligibility	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 RFP clause 3.	Form A: Technical Proposal Submission Form
Conflict of Interest	No conflicts of interest in accordance with RFP clause 4.	Form A: Technical Proposal Submission Form
Bankruptcy	Not declared bankruptcy, not involved in bankruptcy or receivership proceedings, and there is no judgment or pending legal action against the vendor that could impair its operations in the foreseeable future.	Form A: Technical Proposal Submission Form
QUALIFICATION		
History of Non-Performing Contracts¹	Non-performance of a contract did not occur as a result of contractor default for the last 3 years .	Form D: Qualification Form
Litigation History	No consistent history of court/arbitral award decisions against the Bidder for the last 3 years .	Form D: Qualification Form
Previous Experience	Demonstrates at least 5 years of experience of engagement in structuring financial facilities and frameworks in the developmental finance, project finance, blended finance, innovative finance, impact investments assuming engagement of private sector players in development areas	Form D: Qualification Form
	At least 5 years of experience of working with large corporations, banks, institutional investors, family offices, investment funds (VC/PE class), foundations on the matters	Form D: Qualification Form

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

	related to blended finance, impact factored financial frameworks, venture philanthropy, impact investments	
	At least 5 years of experience of working with various private sector players integrations of sustainability in business strategies under various frameworks (responsible investing, sustainable investing, ESG, impact investing etc.)	Form D: Qualification Form
	Minimum 1 contract of similar value, nature and complexity implemented over the last 3 years.	Form D: Qualification Form
	<i>(For JV/Consortium/Association, all Parties cumulatively should meet requirement).</i>	
Financial Standing	Minimum average annual turnover of USD 200,000 for the last 3 years . <i>(For JV/Consortium/Association, all Parties cumulatively should meet requirement).</i>	Form D: Qualification Form
	Bidder must demonstrate the current soundness of its financial standing and indicate its prospective long-term profitability. Financial Statements for the last 3 years to be provided. Dunn & Bradstreet report or Audited Financial Statement (Income Statement and Balance Sheet) including Auditor's Report for last three years duly certified by a Public Accountant, and with authentication of receiving by the Government's Internal Revenue Authority. Include any indication of credit rating, industry rating, etc. <i>(For JV/Consortium/Association, all Parties cumulatively should meet requirement).</i>	Form D: Qualification Form

Technical Evaluation Criteria

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

Section 1. Bidder's qualification, capacity and experience		Points obtainable
1.1	Reputation of Organization and Staff Credibility and Reliability	100
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	100
1.3	Quality assurance procedures and risk mitigation measures	100
Total Section 1		300

Section 2. Proposed Methodology, Approach and Implementation Plan		Points obtainable
2.1	Understanding of the requirement: Have the important aspects of the task been addressed in sufficient detail? Are the different components of the project adequately weighted relative to one another?	80
2.2	Description of the Offeror's approach and methodology for meeting or exceeding the requirements of the Terms of Reference	100
2.3	Details on how the different service elements shall be organized, controlled and delivered	50
2.4	Assessment of the implementation plan proposed including whether the activities are properly sequenced and if these are logical and realistic	70
2.5	Demonstration of ability to plan, integrate and effectively implement sustainability measures in the execution of the contract	100
Total Section 2		400

Section 3. Management Structure and Key Personnel			Points obtainable
3.1	Composition and structure of the team proposed. Are the proposed roles of the management and the team of key personnel suitable for the provision of the necessary services?		60
3.2	Qualifications of key personnel proposed		
3.2 a	Team Leader		120

	- General Experience <ul style="list-style-type: none"> A minimum of 15 years with bachelor's degree or 8 years with master's degree of professional and managerial experience in finance. 	30	
	- Specific Experience relevant to the assignment <ul style="list-style-type: none"> A minimum of 6 years of professional and managerial experience in the sectors related to impact investment, blended finance, philanthropy, VC or PE funds, banks as well as other areas of capital markets. 	50	
	- Regional/International experience <ul style="list-style-type: none"> Previous experience in working on developing countries and emerging markets 	30	
	- Language Qualifications <ul style="list-style-type: none"> Fluent in English language (written & oral) 	10	
3.2 b	Consultant, Finance and Operations		80
	- General Experience <ul style="list-style-type: none"> A minimum of 10 years with bachelor's degree or 5 years with master's degree of professional and managerial experience in finance. 	10	
	- Specific Experience relevant to the assignment <ul style="list-style-type: none"> A minimum of 4 years of professional and managerial experience in the sectors related to in impact investment, blended finance, VC/Private Equity funds. 	40	
	- Regional/International experience <ul style="list-style-type: none"> Previous experience in working on developing countries and emerging markets 	20	
	- Language Qualifications <ul style="list-style-type: none"> Fluent in English language (written & oral) 	10	
3.2 c	Consultant/ Partnerships and Fundraising		40
	General Experience <ul style="list-style-type: none"> A minimum of 10 years with bachelor's degree or 5 years with master's degree of professional and managerial experience in business development, partnerships, PR, government relationships in public and private finance sectors. 	5	
	- Specific Experience relevant to the assignment <ul style="list-style-type: none"> A minimum of 4 years of experience in partnership and fundraising engagements with ODA institutions, international organizations, donors, philanthropy foundations, trusts, family offices, HNWI's. 	15	
	- Regional/International experience <ul style="list-style-type: none"> Previous experience in working on developing countries and emerging markets 	10	
	- Language Qualifications <ul style="list-style-type: none"> Fluent in English language (written & oral) 	10	
Total Section 3			300

SECTION 5. TERMS OF REFERENCE

BACKGROUND & PROJECT DESCRIPTION

There is a growing gap between the interconnected, structural, and increasingly unpredictable and complex challenges we are facing, and the way that development planning is carried out. Societies face challenges that have outpaced the effectiveness of systems we have come to rely on for health care, energy, work, education, and transport. The climate emergency, the lack of trust in institutions, growing levels of inequality, particularly for women, highlight the need for new forms of understanding and acting.

UNDP's new Strategic Plan calls for the organization to embrace a complex systems view of societies and to shift from a logic of single, siloed projects to one of portfolios of interventions that learn from each other over time and are coherent with the systemic nature of structural transformations. Such a programmatic logic will need to be supported by financial instruments that can support if effectively: embracing a long-term perspective and ongoing adaptation, going beyond single point interventions and "silver bullets", and seeking to achieve transformational, rather than incremental effect.

However, most development finance remains biased towards project finance and single point interventions. It is also often skewed towards grant making.

UNDP is seeking to expand these frameworks with a more systemic and portfolio-based financing model that would allow us to fully leverage the role of capital in addressing complex development challenges. For the past year, UNDP together with other organizations has been exploring [how to finance mission-driven sustainability transitions](#) and [raise funds for portfolios](#). The [concept note for a Systemic Fund](#) (SF) design was developed as a potential pooled investment vehicle with the mandate and intent of allocating resources to systemic interventions with a multi-asset strategy for development.

This assignment aims to build on the work done to date by furthering the development of a financial instrument able to fund and mobilize resources for the work on portfolios of strategic interventions and invite funders to "fund courageously", adopting a systemic view. The ambition is to design a financial instrument that is consistent with the intent of designing development intervention that follow a different logic: acknowledging the systemic nature of structural change and embracing the need to adapt and evolve in the face of uncertainty.

In addition, since UNDP anticipates that the capability to design portfolios for systemic change will be increasingly a core asset for the organization, this assignment also covers the design of a dedicated instrument with the aim of mobilizing resources from the private sector and investors for portfolio development itself.

OBJECTIVE

The purpose of this assignment is to engage an international consultancy contractor/a firm, that can design and operationalize the Systemic Fund and design a financial instrument capable of mobilizing resources for UNDP to strengthen capabilities in developing portfolios of strategic interventions.

The assignment has the following objectives:

1. Design the Systemic Fund: a multi-asset financial instrument that is meant to provide a vehicle for interested parties to invest in portfolios in a way that is coherent with the objective of moving beyond linear planning, accounting for the complexity and interconnectedness of development challenges. This work will build on – but is not limited to – the concept note already developed by UNDP.
2. Design a financial instrument that in compliance with its mandate can help UNDP raise funds to develop its capability to create investment ready portfolios that are in line with the new Strategic Plan. Identify bottlenecks and propose enabling amendments to the rules and procedures for operationalization of that instrument.

SCOPE OF WORK

This work will build – but not be constrained by – [the systemic fund concept note](#) already developed by UNDP a pooled investment fund with the mandate and intent of allocating resources to systemic interventions with a multi-asset strategy for development. The contractor will be expected to work with UNDP’s Strategic Innovation Unit, the Sustainable Finance Hub (SFH), thematic clusters leaders (e.g., climate and energy promise, health portfolio) in order to carry out the following tasks:

Task 1: Design A Systemic Fund to support investment in a pipeline of UNDP’s portfolios (e.g., Climate promise, Energy promise, Deep Demonstrations, Health, etc.)

- Recommend investment guidelines for the Fund, including investment criteria and process to screen and evaluate investment opportunities, and process key investment decisions with respect to investment feasibility and design.
- Create a Fund strategy and facility structure, including its governance and operational structure; and operational staff requirements ensuring full compliance with UNDP financial rules, regulations, and policies and financial recording/reporting system.
- Identify a pipeline from UNDPs current work, including existing “portfolios” developed through the Climate promise, the energy promise, Health and the Deep Demonstrations, SFH’s offerings etc.² Identify an initial set of key potential projects to pilot/showcase enabling that will be addressed through the Fund activities.
- Conduct an assessment on the underlying legal, financial and regulatory infrastructure for the fund.
- Outline eligibility, resource allocation and return on investment.
- Design a risk analysis, a results framework, and accountability mechanism that are based on context specific and adaptive measures of success.
- Recommend a detailed roadmap and workplan to establish and operationalize the Fund
- Recommend a capitalization plan and potential sources of impact investors and funders that will contribute to capitalizing the Fund, including study and map out resources and key stakeholders that may materially support the Fund in general and its specific initiatives/projects.

Task 2: Design a financial instrument to mobilize resources to enhance UNDP’s capability to design portfolios to tackle complex development challenges

- Conduct a granular analysis on characteristics of money needed and a comparison of existing suitable financing instruments and their properties and suitability for UNDPs use case.
- Feasibility assessment on innovative resource mobilization mechanisms (e.g., bonds, debt swaps, etc.) that could help UNDP raise funds for developing the capability to design portfolios of strategic interventions.
- Recommendation and a prototype of a financial instrument for resource mobilization to enhance UNDP’s capability to design portfolios to tackle complex development challenges.
- Develop Donor/Funder Engagement Plan, point to potential specific leads with both private sector players (corporates, banks, investment funds, family offices etc.) and with development organizations and IFIs.

Task 3: Final report on the components

- A final report not exceeding 30 pages including the analysis conducted for tasks 1 and 2.

² A list of potential investible portfolios from UNDP will be provided to the vendor to assess their investment-readiness.

DELIVERABLES & IMPLEMENTATION TIMELINE

No.	Deliverable	Estimated days to complete	Target due date
1	An analysis on the potential outfits who could manage the Systemic Fund and the financial instrument (e.g., commercial bank, boutique investment fund, etc.), the rates and fees, the extra features and the networks.	10	10 days from the signing of the contract
2	A Fund strategy and facility structure, including its governance and operational structure; and operational staff requirements ensuring full compliance with UNDP financial rules, regulations, and policies and financial recording/reporting system, establishment roadmap for the Fund.	5	15 days form the signing of the contract
3	Develop projects assessment guideline; Identification of investible pipeline from UNDPs current work, including existing “portfolios” developed through the Climate promise, the energy promise, the Deep Demonstrations, etc. Identify at least 1 portfolio for immediate piloting through the Fund; review of other prospective initiatives to be potentially housed by the Fund.	10	25 days form the signing of the contract
4	An assessment of the underlying legal, financial and regulatory infrastructure for the fund. Outline of eligibility and resource allocation and return on investment, a risk analysis, a results framework, and accountability mechanisms.	5	30 days form the signing of the contract
5	A granular analysis on characteristics of money needed and a comparison of existing suitable financing instruments and their properties and suitability for UNDPs use case.	5	35 days form the signing of the contract
6	Develop an assessment of different funding streams and innovative resource mobilization mechanisms (e.g., bonds, debt swaps, etc.) to fund UNDP’s capability to design portfolios of strategic interventions. Develop Donor/Funder Engagement Plan, point to potential specific leads with both private sector players (corporates, banks, investment funds, family offices etc.) and with development organizations and IFIs.	10	45 days form the signing of the contract
7	Develop key recommendations and a prototype to fund the development of UNDPs capabilities to develop systemic interventions.	5	50 days form the signing of the contract
8	Final report (20 pages) including the above components	15	65 days form the signing of the contract

DURATION OF ASSIGNMENT, DUTY STATION & EXPECTED PLACES OF TRAVEL

Estimated number of working days: 65 working days

Duty station: This assignment will be largely delivered remotely to circumvent the challenges of traveling in this current pandemic context. Therefore, no significant logistical aspects will feature in this assignment.

Expected places of travel: No

PROVISION OF MONITORING & PROGRESS CONTROL

The chosen contractor will be supervised by the Head of the Strategic Innovation Unit who will sign off on the deliverables. The contractor will work in close collaboration with the SIU team and other partners.

DEGREE OF EXPERTISE & QUALIFICATIONS

- A reputable firm that has a track record in systems transformation and financial instruments in a development context.
- The company profile demonstrates at least 5 years of experience of engagement in structuring financial facilities and frameworks in the of developmental finance, project finance, blended finance, innovative finance, impact investments assuming engagement of private sector players in development areas. Required.
- At least **5 years** of experience of working with large corporations, banks, institutional investors, family offices, investment funds (VC/PE class), foundations on the matters related to blended finance, impact factored financial frameworks, venture philanthropy, impact investments. Required.
- At least **5 years** of experience of working with various private sector players integrations of sustainability in business strategies under various frameworks (responsible investing, sustainable investing, ESG, impact investing etc.) Required.
- Demonstrated track record on advisory support to international organizations.
- Experience with public/donor/concessional development finance.
- Have a successful track of knowledge transfer of technical expertise to public sector and private clients in developing countries.
- Knowledge of and familiarity with the operations of UN agencies in key developed markets.
- Have an experienced team able to cover all the requirements of this assignment remotely.

The consultancy contractor is expected to have the following minimum individual expertise available to the assignment:

Team Leader, Senior Consultant

Qualifications	<ul style="list-style-type: none"> • Minimum Bachelor's degree is required, or master's degree or higher in business management, finance, investment, or closely related fields is desirable.
Relevant Professional Experience	<ul style="list-style-type: none"> • A minimum of 15 years with bachelor's degree or 8 years with master's degree of professional and managerial experience in the sectors related to impact investment, blended finance, philanthropy, VC or PE funds, banks as well as other areas of capital markets. Required • A minimum of 6 years professional and managerial experience in the sectors related to impact investment, blended finance, philanthropy, VC or PE funds, banks as well as other areas of capital markets. Required • Experience in consulting international organizations with a focus on impact investment.is desirable. • Experience working with emerging market private equity investment and blended finance is desirable • Experience in advisory for business model sustainability and impact enhancement is desirable. • Knowledge of entrepreneurship in the developing country context and ability to apply to strategic and/or practical situations is desirable.. • Knowledge of global development financial trends, global financial institutions and processes, and ability to apply in strategic and/or practical situations is highly desirable • Experience on the public finance management project is desirable. • Experience on the public finance management project is desirable.

Other Competencies	<ol style="list-style-type: none"> 1. Advanced understanding of financial markets and investor landscapes in emerging markets. 2. Ability to synthesize variety of information about rules and procedures (regarding financial tools) and emerging trends into new forms of (financial) instruments. 3. Ability to turn complex ideas into practical concepts. 4. Good communication skills, sensitivity and willingness/flexibility to respond to client's needs.
Language Requirements	Fluent in English language (written & oral)

Consultant/ Finance and Operations Expert

Qualifications	<ul style="list-style-type: none"> • Minimum bachelor's degree is required, or master's degree or higher in business management, finance, investment, or closely related fields is desirable.
Relevant Professional Experience	<ul style="list-style-type: none"> • A minimum of 10 years with bachelor's degree or 5 years with master's degree of professional and managerial experience in the sectors related to in impact investment, blended finance, VC/Private Equity funds. Required • A minimum of 4 years of professional and managerial experience in the sectors related to in impact investment, blended finance, VC/Private Equity funds. Required • Experience in consulting international organizations with a focused on financial tools and frameworks is desirable • Knowledge of global development financial trends, global financial institutions and processes, and ability to apply in strategic and/or practical situations is desirable. • Experience with providing project due diligence, operations, process improvement and assurance services is required. • Experience working with emerging market blended finance is desirable. • Experience in advisory for business model sustainability and impact enhancement is desirable. • Knowledge of Entrepreneurship in the developing world and ability to apply to strategic and/or practical situations is highly desirable.
Other Competencies	<ol style="list-style-type: none"> 1. Advanced understanding of financial markets and investor landscapes in emerging markets. 2. Ability to synthesize variety of information about rules and procedures (regarding financial tools) and emerging trends into new forms of (financial) instruments. 3. Ability to turn complex ideas into practical concepts. 4. Good communication skills, sensitivity and willingness/flexibility to respond to client's needs.
Language Requirements	Fluent in English language (written & oral)

Consultant/ Partnerships and Fundraising

Qualifications	<ul style="list-style-type: none"> • Minimum bachelor's degree is required, or master's degree or higher in business management, finance, investment, marketing and communications or related fields is desirable.
Relevant Professional Experience	<ul style="list-style-type: none"> • A minimum of 10 years with bachelor's degree or 5 years with master's degree of professional and managerial experience in business development,

	<p>partnerships, PR, government relationships in public and private finance sectors. Required</p> <ul style="list-style-type: none"> • A minimum of 4 years of experience in partnership and fundraising engagements with ODA institutions, international organizations, donors, philanthropy foundations, trusts, family offices, HNWI is required. • Knowledge of global trends in philanthropy, developmental finance, global financial institutions and processes, and ability to apply in strategic and/or practical situations is desirable. • A good working knowledge of the small / medium enterprise, social enterprise, impact ventures and non-profit sector and sustainable funding models is desirable. • Experience working with emerging market blended finance is desirable. • Knowledge of Entrepreneurship in the developing world and ability to apply to strategic and/or practical situations is highly desirable.
Other Competencies	<ol style="list-style-type: none"> 1. Advanced understanding of financial markets and investor landscapes in emerging markets. 2. Ability to synthesize variety of information about rules and procedures (regarding financial tools) and emerging trends into new forms of (financial) instruments. 3. Ability to turn complex ideas into practical concepts. 4. Good communication skills, sensitivity and willingness/flexibility to respond to client's needs.
Language Requirements	Fluent in English language (written & oral)

It is expected to have the following engagement levels for the proposed consultants:

Grade	Tentative # of days (cumulatively)	Grade
Senior Consultant, Team Leader	15-20	Senior Consultant, Team Leader
Consultant, Finance and Operations	25-30	Consultant, Finance and Operations
Consultant, Partnerships and Fundraising	10-15	Consultant, Partnerships and Fundraising

PAYMENT TERMS

The contractor shall receive payments based on the following schedule:

No.	Deliverables as indicated in Section	Target due date	% of payment
1	Deliverable 1	10 days from the signing of the contract	15%
2	Deliverable 2	15 days form the signing of the contract	7.5%
3	Deliverable 3	25 days form the signing of the contract	15%
4	Deliverable 4	30 days form the signing of the contract	7.5%
5	Deliverable 5	35 days form the signing of the contract	7.5%
6	Deliverable 6	45 days form the signing of the contract	15%
7	Deliverable 7	50 days form the signing of the contract	7.5%
8	Deliverable 8	65 days form the signing of the contract	25%

SECTION 6: RETURNABLE BIDDING FORMS / CHECKLIST

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:

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

Financial Proposal Envelope

(Must be submitted in a separate sealed envelope/password protected email)

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

FORM A: TECHNICAL PROPOSAL SUBMISSION FORM

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

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

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

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

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

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

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

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

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

Name: _____

Title: _____

Date: _____

Signature: _____

[Stamp with official stamp of the Bidder]

FORM B: BIDDER INFORMATION FORM

Legal name of Bidder	[Complete]
Legal address	[Complete]
Year of registration	[Complete]
Bidder's Authorized Representative Information	Name and Title: [Complete] Telephone numbers: [Complete] Email: [Complete]
Are you a UNGM registered vendor?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, [insert UGNM vendor number]
Are you a UNDP vendor?	<input type="checkbox"/> Yes <input type="checkbox"/> 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:	<ul style="list-style-type: none"> ▪ Company Profile, which should <u>not</u> 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.

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

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]
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We have attached a copy of the below document signed by every partner, which details the likely legal structure of and the confirmation of joint and severable liability of the members of the said joint venture:

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

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

Name of partner: _____ Name of partner: _____

Signature: _____ Signature: _____

Date: _____ Date: _____

Name of partner: _____ Name of partner: _____

Signature: _____ Signature: _____

Date: _____ Date: _____

FORM D: QUALIFICATION FORM

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

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

Historical Contract Non-Performance

<input type="checkbox"/> Contract non-performance did not occur for the last 3 years			
<input type="checkbox"/> Contract(s) not performed for the last 3 years			
Year	Non- performed portion of contract	Contract Identification	Total Contract Amount (current value in US\$)
		Name of Client: Address of Client: Reason(s) for non-performance:	

Litigation History (including pending litigation)

<input type="checkbox"/> No litigation history for the last 3 years			
<input type="checkbox"/> Litigation History as indicated below			
Year of dispute	Amount in dispute (in US\$)	Contract Identification	Total Contract Amount (current value in US\$)
		Name of Client: Address of Client: Matter in dispute: Party who initiated the dispute: Status of dispute: Party awarded if resolved:	

Previous Relevant Experience

Please list only previous similar assignments with similar value, nature and complexity successfully completed in the last **3 years**. List only those assignments for which the Bidder was legally contracted or sub-contracted by the Client as a company or was one of the Consortium/JV partners. Assignments completed by the Bidder's individual experts working privately or through other firms cannot be claimed as the relevant experience of the Bidder, or that of the Bidder's partners or sub-consultants, but can be claimed by the Experts themselves in their CVs. The Bidder should be prepared to substantiate the claimed experience by presenting copies of relevant documents and references if so requested by UNDP.

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

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

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

Financial Standing

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

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

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

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

FORM E: FORMAT OF TECHNICAL PROPOSAL

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

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

SECTION 1: Bidder's qualification, capacity and expertise

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

SECTION 2: Proposed Methodology, Approach and Implementation Plan

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

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

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

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

SECTION 3: Management Structure and Key Personnel

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

Format for CV of Proposed Key Personnel

Name of Personnel	[Insert]
Position for this assignment	[Insert]
Nationality	[Insert]
Language proficiency	[Insert]
Education/ Qualifications	<i>[Summarize college/university and other specialized education of personnel member, giving names of schools, dates attended, and degrees/qualifications obtained.]</i> [Insert]
Professional certifications	<i>[Provide details of professional certifications relevant to the scope of services]</i> <ul style="list-style-type: none"> ▪ Name of institution: [Insert] ▪ Date of certification: [Insert]
Employment Record/ Experience	<i>[List all positions held by personnel (starting with present position, list in reverse order), giving dates, names of employing organization, title of position held and location of employment. For 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.]</i> [Insert]
References	<i>[Provide names, addresses, phone and email contact information for two (2) references]</i> Reference 1: [Insert] Reference 2: [Insert]

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

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

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

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

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

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

Name: _____
Title: _____
Date: _____
Signature: _____

[Stamp with official stamp of the Bidder]

FORM G: FINANCIAL PROPOSAL FORM

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

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

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

Currency of the proposal: [Insert Currency]

Table 1: Breakdown of Price per Deliverable

Deliverable/ Activity description	Time (person days)	Professional Fees	Other Costs	Total
Deliverable 1 An analysis on the potential outfits who could manage the Systemic Fund and the financial instrument (e.g., commercial bank, boutique investment fund, etc.), the rates and fees, the extra features and the networks.				
Deliverable 2 A Fund strategy and facility structure, including its governance and operational structure; and operational staff requirements ensuring full compliance with UNDP financial rules, regulations, and policies and financial recording/reporting system, establishment roadmap for the Fund.				
Deliverable 3 Develop projects assessment guideline; Identification of investible pipeline from UNDPs current work, including existing "portfolios" developed through the Climate promise, the energy promise, the Deep Demonstrations, etc. Identify at least 1 portfolio for immediate piloting through the Fund; review of other prospective initiatives to be potentially housed by the Fund.				

Deliverable 4 An assessment of the underlying legal, financial and regulatory infrastructure for the fund. Outline of eligibility and resource allocation and return on investment, a risk analysis, a results framework, and accountability mechanisms.				
Deliverable 5 A granular analysis on characteristics of money needed and a comparison of existing suitable financing instruments and their properties and suitability for UNDPs use case.				
Deliverable 6 Develop an assessment of different funding streams and innovative resource mobilization mechanisms (e.g., bonds, debt swaps, etc.) to fund UNDP's capability to design portfolios of strategic interventions. Develop Donor/Funder Engagement Plan, point to potential specific leads with both private sector players (corporates, banks, investment funds, family offices etc.) and with development organizations and IFIs.				
Deliverable 7 Develop key recommendations and a prototype to fund the development of UNDPs capabilities to develop systemic interventions.				
Deliverable 8 Final report (20 pages) including the above components				

Table 2: Breakdown of Fees by cost components

Name	Position	Fee Rate	No. of Days/months/ hours	Total Amount
		A	B	C=A+B
Subtotal Professional Fees:				
Other Costs: (please specify)				
Grand Total				