REQUEST FOR PROPOSAL

For writing and editing of three "World Solar Annual Reports"

RFP No.: 002/02/2022

Country: India

Issued on: 14 February 2022

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Section 1. Letter of Invitation

The International Solar Alliance (ISA) 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

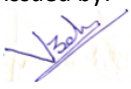
- Form A: Technical Proposal Submission Form
- Form B: Bidder Information Form
- Form C: Joint Venture/Consortium/Association Information Form (Not Applicable)
- Form D: Qualification Form
- Form E: Format of Technical Proposal
- Form F: Financial Proposal Submission Form
- Form G: Financial Proposal Form

If you are interested in submitting a Proposal in response to this RFP, please prepare your Proposal in accordance with the requirements and procedure as set out in this RFP and submit it by the Deadline for Submission of Proposals set out in Bid Data Sheet.

Please acknowledge receipt of this RFP by sending an email to procurement@isolaralliance.org , indicating whether you intend to submit a Proposal or otherwise. You may send the Technical Proposal and the Financial Proposal files separately. The financial and technical proposal shall be encrypted with different passwords and clearly labelled. Any Amendments to the RFP will be notified on ISA Website. 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.

ISA looks forward to receiving your Proposal and thank you in advance for your interest in ISA procurement opportunities.

Issued by:



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Name: Vineet Mathur

Title: Administrative & Procurement Analyst

Date: 14 February 2022

Section 2. Instruction to Bidders

A. GENERAL PROVISIONS	
1. *Introduction*	1.1 Bidders shall adhere to all the requirements of this RFP, including any amendments in writing by ISA. 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 ISA. ISA is under no obligation to award a contract to any Bidder as a result of this RFP.
2. *Fraud & Corruption, Gifts and Hospitality*	2.1 ISA strictly enforces a policy of zero tolerance on proscribed practices, including fraud, corruption, collusion, unethical or unprofessional practices, and obstruction of ISA vendors and requires all bidders/vendors observe the highest standard of ethics during the procurement process and contract implementation. 2.2 Bidders/vendors shall not offer gifts or hospitality of any kind to ISA staff members including recreational trips to sporting or cultural events, theme parks or offers of holidays, transportation, or invitations to extravagant lunches or dinners. 2.3 In pursuance of this policy, ISA (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 ISA contract. 2.4 All Bidders must adhere to the UN Supplier Code of Conduct, which may be found at http://www.un.org/depts/ptd/pdf/conduct_english.pdf
3. *Eligibility*	3.1 A vendor should not be suspended, debarred, or otherwise identified as ineligible by any UN Organization or the World Bank Group or any other international Organization. Vendors are therefore required to disclose to ISA whether they are subject to any sanction or temporary suspension imposed by these organizations. 3.2 It is the Bidder's responsibility to ensure that its employees, joint venture members, sub-contractors, service providers, suppliers and/or their employees meet the eligibility requirements as established by ISA.
4. *Conflict of Interests*	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: a) Are or have been associated in the past, with a firm or any of its affiliates which have been engaged by ISA to provide services for the preparation of the design, specifications, Terms of Reference, cost analysis/estimation, and other documents to be used for the procurement of the goods and services in this selection process; b) Were involved in the preparation and/or design of the programme/project related to the services requested under this RFP; or c) Are found to be in conflict for any other reason, as may be established by, or at the discretion of ISA. 4.2 In the event of any uncertainty in the interpretation of a potential conflict of interest, Bidders must disclose to ISA, and seek ISA' s confirmation on whether or not such a conflict exists. 4.3 Similarly, the Bidders must disclose in their proposal their knowledge of the following:

	a) If the owners, part-owners, officers, directors, controlling shareholders, of the bidding entity or key personnel are family members of ISA staff involved in the procurement functions and/or the Government of the country or any Implementing Partner receiving services under this RFP; and b) All other circumstances that could potentially lead to actual or perceived conflict of interest, collusion or unfair competition practices. Failure to disclose such an information may result in the rejection of the proposal or proposals affected by the non-disclosure. 4.4 The eligibility of Bidders that are wholly or partly owned by the Government shall be subject to ISA's further evaluation and review of various factors such as being registered, operated and managed as an independent business entity, the extent of Government ownership/share, receipt of subsidies, mandate and access to information in relation to this RFP, among others. Conditions that may lead to undue advantage against other Bidders may result in the eventual rejection of the Proposal.
B. PREPARATION OF PROPOSALS	
5. General Considerations	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. 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 ISA
6. Cost of Preparation of Proposal	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. ISA shall not be responsible or liable for those costs, regardless of the conduct or outcome of the procurement process.
7. Language	7.1 The Proposal, as well as any and all related correspondence exchanged by the Bidder and ISA, shall be written in the language (s) specified in the BDS.
8. Documents Comprising the Proposal	8.1 The Proposal shall comprise of the following documents: a) Documents Establishing the Eligibility and Qualifications of the Bidder; b) Technical Proposal; c) Financial Proposal; d) Proposal Security, if required by BDS; e) Any attachments and/or appendices to the Proposal.
9. Documents Establishing the Eligibility and Qualifications of the Bidder	9.1 The Bidder shall furnish documentary evidence of its status as an eligible and qualified vendor, using the Forms provided under Section 6 and providing documents required in those forms. In order to award a contract to a Bidder, its qualifications must be documented to ISA's satisfaction.
10. Technical Proposal Format and Content	10.1 The Bidder is required to submit a Technical Proposal using the Standard Forms and templates provided in Section 6 of the RFP. 10.2 The Technical Proposal shall not include any price or financial information. A Technical Proposal containing material financial information may be declared non-responsive. 10.3 Samples of items, when required as per Section 5, shall be provided within the time specified and unless otherwise specified by ISA, and at no expense to ISA 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 ISA. Unless otherwise specified, such training as well as training materials shall be provided in the language of the Bid as specified in the BDS.
11. Financial Proposals	11.1	The Financial Proposal shall be prepared using the Standard Form provided in Section 6 of the RFP. It shall list all major cost components associated with the services, and the detailed breakdown of such costs.
	11.2	Any output and activities described in the Technical Proposal but not priced in the Financial Proposal, shall be assumed to be included in the prices of other activities or items, as well as in the final total price.
	11.3	Prices and other financial information must not be disclosed in any other place except in the financial proposal.
12. Proposal Security	12.1	A Proposal Security, if required by BDS, shall be provided in the amount and form indicated in the BDS. The Proposal Security shall be valid up to thirty (30) days after the final date of validity of the Proposal.
	12.2	The Proposal Security shall be included along with the Technical Proposal. If Proposal Security is required by the RFP but is not found along with the Technical Proposal, the Proposal shall be rejected.
	12.3	If the Proposal Security amount or its validity period is found to be less than what is required by ISA, ISA shall reject the Proposal.
	12.4	In the event an electronic submission is allowed in the BDS, Bidders shall include a copy of the Bid Security in their proposal and the original of the Proposal Security must be sent via courier or hand delivery as per the instructions in BDS.
	12.5	The Proposal Security may be forfeited by ISA, and the Proposal rejected, in the event of any one or combination, of the following conditions: a) If the Bidder withdraws its offer during the period of the Proposal Validity specified in the BDS, or; b) In the event that the successful Bidder fails: i. to sign the Contract after ISA has issued an award; or
	12.6	to furnish the Performance Security, insurances, or other documents that ISA may require as a condition precedent to the effectivity of the contract that may be awarded to the Bidder.
13. Currencies	13.1	All prices shall be quoted in the currency or currencies indicated in the BDS. Where Proposals are quoted in different currencies, for the purposes of comparison of all Proposals: a) ISA will convert the currency quoted in the Proposal into the ISA 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 ISA selects a proposal for award that is quoted in a currency different from the preferred currency in the BDS, ISA shall reserve the right to award the contract in the currency of ISA's preference, using the conversion method specified above.
14. Joint Venture, Consortium or Association	14.1	If the Bidder is a group of legal entities that will form or have formed a Joint Venture (JV), Consortium or Association for the Proposal, they shall confirm in their Proposal that : (i) they have designated one party to act as a lead entity, duly vested with authority to legally bind the members of the JV, Consortium or Association jointly and severally, which shall be evidenced by a duly notarized Agreement among the legal entities, and submitted with the Proposal; and (ii) if they

	are awarded the contract, the contract shall be entered into, by and between ISA and the designated lead entity, who shall be acting for and on behalf of all the member entities comprising the joint venture. 14.2 After the Deadline for Submission of Proposal, the lead entity identified to represent the JV, Consortium or Association shall not be altered without the prior written consent of ISA. 14.3 The lead entity and the member entities of the JV, Consortium or Association shall abide by the provisions of Clause 9 herein in respect of submitting only one proposal. 14.4 The description of the organization of the JV, Consortium or Association must clearly define the expected role of each of the entity in the joint venture in delivering the requirements of the RFP, both in the Proposal and the JV, Consortium or Association Agreement. All entities that comprise the JV, Consortium or Association shall be subject to the eligibility and qualification assessment by ISA. 14.5 A JV, Consortium or Association in presenting its track record and experience should clearly differentiate between: a) Those that were undertaken together by the JV, Consortium or Association; and b) Those that were undertaken by the individual entities of the JV, Consortium or Association. 14.6 Previous contracts completed by individual experts working privately but who are permanently or were temporarily associated with any of the member firms cannot be claimed as the experience of the JV, Consortium or Association or those of its members, but should only be claimed by the individual experts themselves in their presentation of their individual credentials. JV, Consortium or Associations are encouraged for high value, multi-sectoral requirements when the spectrum of expertise and resources required may not be available within one firm.
15. Only One Proposal	15.1 The Bidder (including the individual members of any Joint Venture) shall submit only one Proposal, either in its own name or as part of a Joint Venture. 15.2 Proposals submitted by two (2) or more Bidders shall all be rejected if they are found to have any of the following: a) they have at least one controlling partner, director or shareholder in common; or b) any one of them receive or have received any direct or indirect subsidy from the other/s; or c) they have the same legal representative for purposes of this RFP; or d) 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; e) 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 f) some key personnel proposed to be in the team of one Bidder participates in more than one Proposal received for this RFP process. This condition relating to the personnel, does not apply to subcontractors being included in more than one Proposal.
16. Proposal Validity Period	16.1 Proposals shall remain valid for the period specified in the BDS, commencing on the Deadline for Submission of Proposals. A Proposal valid for a shorter period may be rejected by ISA and rendered non-responsive. 16.2 During the Proposal validity period, the Bidder shall maintain its original Proposal without any change, including the availability of the Key Personnel, the proposed rates and the total price.
17. Extension of	17.1 In exceptional circumstances, prior to the expiration of the proposal validity period, ISA may request Bidders to extend the period of validity of their Proposals. The request

Proposal Validity Period		and the responses shall be made in writing, and shall be considered integral to the Proposal.
	17.2	If the Bidder agrees to extend the validity of its Proposal, it shall be done without any change in the original Proposal.
	17.3	The Bidder has the right to refuse to extend the validity of its Proposal, and in which case, such Proposal will not be further evaluated.
18. Clarification of Proposal	18.1	Bidders may request clarifications on any of the RFP documents no later than the date indicated in the BDS. Any request for clarification must be sent in writing in the manner indicated in the BDS. If inquiries are sent other than specified channel, even if they are sent to an ISA staff member, ISA shall have no obligation to respond or confirm that the query was officially received.
	18.2	ISA will provide the responses to clarifications through the method specified in the BDS.
	18.3	ISA 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 ISA to extend the submission date of the Proposals, unless ISA deems that such an extension is justified and necessary.
19. Amendment of Proposals	19.1	At any time prior to the deadline of Proposal submission, ISA 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.
	19.2	If the amendment is substantial, ISA may extend the Deadline for submission of proposal to give the Bidders reasonable time to incorporate the amendment into their Proposals.
20. Alternative Proposals	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. ISA shall only consider the alternative proposal offered by the Bidder whose conforming proposal ranked the highest as per the specified evaluation method. Where the conditions for its acceptance are met, or justifications are clearly established, ISA reserves the right to award a contract based on an alternative proposal.
	20.2	If multiple/alternative proposals are being submitted, they must be clearly marked as "Main Proposal" and "Alternative Proposal"
21. Pre-Bid Conference	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. 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.
C. SUBMISSION AND OPENING OF PROPOSALS		

22. Submission	22.1 The Bidder shall submit a duly signed and complete Proposal comprising the documents and forms in accordance with the requirements in the BDS. The submission shall be in the manner specified in the BDS. 22.2 The Proposal shall be signed by the Bidder or person(s) duly authorized to commit the Bidder. The authorization shall be communicated through a document evidencing such authorization issued by the legal representative of the bidding entity, or a Power of Attorney, accompanying the Proposal. 22.3 Bidders must be aware that the mere act of submission of a Proposal, in and of itself, implies that the Bidder fully accepts the ISA General Contract Terms and Conditions.
Email Submission	22.4 Email submission, if allowed or specified in the BDS, shall be governed as follows: a) Electronic files that form part of the proposal must be in accordance with the format and requirements indicated in BDS; b) The Technical Proposal and the Financial Proposal files MUST BE COMPLETELY SEPARATE. The financial proposal shall be encrypted with different passwords and clearly labelled. The files must be sent to the dedicated email address specified in the BDS. c) The password for opening the Financial Proposal should be provided only upon request of ISA. ISA 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.
23. Deadline for Submission of Proposals and Late Proposals	23.1 Complete Proposals must be received by ISA in the manner, and no later than the date and time, specified in the BDS. ISA shall only recognize the date and time that the bid was received by ISA 23.2 ISA shall not consider any Proposal that is submitted after the deadline for the submission of Proposals.
24. Withdrawal, Substitution, and Modification of Proposals	24.1 A Bidder may withdraw, substitute or modify its Proposal after it has been submitted at any time prior to the deadline for submission. 24.2 Manual and Email submissions: A bidder may withdraw, substitute or modify its Proposal by sending a written notice to ISA, duly signed by an authorized representative, and shall include a copy of the authorization (or a Power of Attorney). The corresponding substitution or modification of the Proposal, if any, must accompany the respective written notice. All notices must be submitted in the same manner as specified for submission of proposals, by clearly marking them as "WITHDRAWAL" "SUBSTITUTION," or "MODIFICATION" 24.3 Proposals requested to be withdrawn shall be returned unopened to the Bidders (only for manual submissions), except if the bid is withdrawn after the bid has been opened
25. Proposal Opening	25.1 There is no public bid opening for RFPs. ISA shall open the Proposals in the presence of an ad-hoc committee formed by ISA, consisting of at least two (2) members.
D. EVALUATION OF PROPOSALS	
26. Confidentiality	26.1 Information relating to the examination, evaluation, and comparison of Proposals, and the recommendation of contract award, shall not be disclosed to Bidders or any other persons not officially concerned with such process, even after publication of the

	contract award. 26.2 Any effort by a Bidder or anyone on behalf of the Bidder to influence ISA in the examination, evaluation and comparison of the Proposals or contract award decisions may, at ISA's decision, result in the rejection of its Proposal and may be subject to the application of prevailing ISA vendor sanctions procedures.
27. Evaluation of Proposals	27.1 The Bidder is not permitted to alter or modify its Proposal in any way after the proposal submission deadline except as permitted under Clause 24 of this RFP. ISA will conduct the evaluation solely on the basis of the submitted Technical and Financial Proposals. 27.2 Evaluation of proposals is made of the following steps: a) Preliminary Examination b) Minimum Eligibility and Qualification (if pre-qualification is not done) c) Evaluation of Technical Proposals d) Evaluation of Financial Proposals
28. Preliminary Examination	28.1 ISA 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. ISA reserves the right to reject any Proposal at this stage.
29. Evaluation of Eligibility and Qualification	a) Eligibility and Qualification of the Bidder will be evaluated against the Minimum Eligibility/Qualification requirements specified in the Section 4 (Evaluation Criteria). b) In general terms, vendors that meet the following criteria may be considered qualified: c) They are not included in the UN Security Council 1267/1989 Committee's list of terrorists and terrorist financiers. d) They have a good financial standing and have access to adequate financial resources to perform the contract and all existing commercial commitments, e) 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; f) They are able to comply fully with ISA General Terms and Conditions of Contract; g) They do not have a consistent history of court/arbitral award decisions against the Bidder; and h) They have a record of timely and satisfactory performance with their clients. i) The consulting firm should provide credentials, through adequate references or documentation, of the following qualifications: j) Current local presence in the ISA focus countries. Past experience of working with ISA and/or with multilateral/international organizations will be an added advantage
30. Evaluation of Technical and Financial Proposals	30.1 The evaluation team shall review and evaluate the Technical Proposals on the basis of their responsiveness to the Terms of Reference and other RFP documents, applying the evaluation criteria, sub-criteria, and point system specified in the Section 4 (Evaluation Criteria). A Proposal shall be rendered non-responsive at the technical evaluation stage if it fails to achieve the minimum technical score indicated in the BDS. When necessary and if stated in the BDS, ISA may invite technically responsive bidders for a presentation

	related to their technical proposals. The conditions for the presentation shall be provided in the bid document where required. 30.2 In the second stage, only the Financial Proposals of those Bidders who achieve the minimum technical score will be opened for evaluation. The Financial Proposals corresponding to Technical Proposals that were rendered non-responsive shall remain unopened, and, in the case of manual submission, be returned to the Bidder unopened. For emailed Proposals submissions, ISA will not request for the password of the Financial Proposals of bidders whose Technical Proposal were found not responsive. 30.3 The evaluation method that applies for this RFP shall be as indicated in the BDS, which may be either of two (2) possible methods, as follows: (a) the lowest priced method which selects the lowest evaluated financial proposal of the technically responsive Bidders; or (b) the combined scoring method which will be based on a combination of the technical and financial score. 30.4 When the BDS specifies a combined scoring method, the formula for the rating of the Proposals will be as follows: Rating the Technical Proposal (TP): **TP Rating** = (Total Score Obtained by the Offer / Max. Obtainable Score for TP) x 100 Rating the Financial Proposal (FP): **FP Rating** = (Lowest Priced Offer / Price of the Offer Being Reviewed) x 100 Total Combined Score: **Combined Score =** (TP Rating) x (Weight of TP, e.g. 70%) + (FP Rating) x (Weight of FP, e.g., 30%)
31. Due Diligence	31.1 ISA reserves the right to undertake a due diligence exercise, also called post qualification, aimed at determining to its satisfaction, the validity of the information provided by the Bidder. Such exercise shall be fully documented and may include, but need not be limited to, all or any combination of the following: a) Verification of accuracy, correctness and authenticity of information provided by the Bidder; b) Validation of extent of compliance to the RFP requirements and evaluation criteria based on what has so far been found by the evaluation team; c) Inquiry and reference checking with Government entities with jurisdiction on the Bidder, or with previous clients, or any other entity that may have done business with the Bidder; d) Inquiry and reference checking with previous clients on the performance on on-going or contracts completed, including physical inspections of previous works, as necessary; e) Physical inspection of the Bidder's offices, branches or other places where business transpires, with or without notice to the Bidder; f) Other means that ISA may deem appropriate, at any stage within the selection process, prior to awarding the contract.
32. Clarification of Proposals	32.1 To assist in the examination, evaluation and comparison of Proposals, ISA may, at its discretion, ask any Bidder for a clarification of its Proposal. 32.2 ISA'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 ISA in the evaluation of the Proposals, in accordance with RFP. 32.3 Any unsolicited clarification submitted by a Bidder in respect to its Proposal, which is not a response to a request by ISA, shall not be considered during the review and evaluation of the Proposals.
33. Responsiveness of Proposal	33.1	ISA's determination of a Proposal's responsiveness will be based on the contents of the Proposal itself. A substantially responsive Proposal is one that conforms to all the terms, conditions, TOR and other requirements of the RFP without material deviation, reservation, or omission. 33.2 If a Proposal is not substantially responsive, it shall be rejected by ISA and may not subsequently be made responsive by the Bidder by correction of the material deviation, reservation, or omission.
34. Nonconformities, Reparable Errors and Omissions	34.1	Provided that a Proposal is substantially responsive, ISA may waive any non-conformities or omissions in the Proposal that, in the opinion of ISA, do not constitute a material deviation. 34.2 ISA may request the Bidder to submit the necessary information or documentation, within a reasonable period of time, to rectify nonmaterial nonconformities or omissions in the Proposal related to documentation requirements. Such omission shall not be related to any aspect of the price of the Proposal. Failure of the Bidder to comply with the request may result in the rejection of its Proposal. 34.3 For Financial Proposal that has been opened, ISA shall check and correct arithmetical errors as follows: a) if there is a discrepancy between the unit price and the line item total that is obtained by multiplying the unit price by the quantity, the unit price shall prevail and the line item total shall be corrected, unless in the opinion of ISA there is an obvious misplacement of the decimal point in the unit price; in which case the line item total as quoted shall govern and the unit price shall be corrected; b) if there is an error in a total corresponding to the addition or subtraction of subtotals, the subtotals shall prevail, and the total shall be corrected; and c) if there is a discrepancy between words and figures, the amount in words shall prevail, unless the amount expressed in words is related to an arithmetic error, in which case the amount in figures shall prevail. 34.4 If the Bidder does not accept the correction of errors made by ISA, its Proposal shall be rejected.
E. AWARD OF CONTRACT		
35. Right to Accept, Reject, Any or All Proposals	35.1	ISA reserves the right to accept or reject any Proposal, to render any or all of the Proposals as non-responsive, and to reject all Proposals at any time prior to award of contract, without incurring any liability, or obligation to inform the affected Bidder(s) of the grounds for ISA's action. ISA shall not be obliged to award the contract to the lowest priced offer.
36. Award Criteria	36.1	Prior to expiration of the proposal validity, ISA shall award the contract to the qualified Bidder based on the award criteria indicated in the BDS.
37. Right to Vary Requirements at	37.1	At the time of award of Contract, ISA 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.

the Time of Award	
38. Contract Signature	38.1 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 ISA. 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, ISA may award the Contract to the Second Ranked Bidder or call for new Proposals.
39. Performance Security	39.1 A performance security, if required in BDS, shall be provided in the amount specified in BDS. Within fifteen (15) days of the contract signature by both parties. Where a performance security is required, the receipt of the performance security by ISA shall be a condition for rendering the contract effective.
40. Bank Guarantee for Advanced Payment	40.1 Except when the interests of ISA so require, it is ISA'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.
41. Liquidated Damages	41.1 If specified in BDS, ISA shall apply Liquidated Damages resulting from the Contractor's delays or breach of its obligations as per the Contract.
42. Payment Provisions	42.1 Payment will be made only upon ISA's acceptance of the work performed. The terms of payment shall be within thirty (30) days, after receipt of invoice and certification of acceptance of work issued by the proper authority in ISA with direct supervision of the Contractor. Payment will be affected by bank transfer in the currency of contract.
43. Other Provisions	43.1 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, ISA shall be entitled to same lower price. The ISA General Terms and Conditions shall have precedence. 43.2 ISA is entitled to receive the same pricing offered by the same Contractor in contracts with the United Nations and/or its Agencies. The ISA General Terms and Conditions shall have precedence. 43.3 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 http://www.un.org/en/ga/search/view_doc.asp?symbol=ST/SGB/2006/15&referer 43.4 Termination: Either Party may terminate the Contract for cause, in whole or in part, upon thirty (30) days' notice, in writing, to the other Party. 43.5 ISA may terminate the Contract at any time by providing written notice to the Contractor in any case in which the mandate of ISA applicable to the performance of the Contract or the funding of ISA applicable to the Contract is curtailed or terminated, whether in whole or in part. In addition, unless otherwise provided by the Contract, upon sixty (60) day's advance written notice to the Contractor, ISA may terminate the Contract without having to provide any justification therefor. 43.6 Penalties: If the contractors fails to complete the works within the time specified in the contract, the supplier will pay the procuring entity liquidated damages for each calendar day of delay (1%) of the price of the contract, up to a maximum percentage of the final price of the contract. The procuring entity will be entitled to deduct any liquidated damages from the supplier's outstanding invoices, if any.

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 be Conducted **Provide details below if ""Will be Conducted" is selected, otherwise delete the below** **Time: 3.00 PM IST, which means 9:30 am GMT** **Date: 21 February 2022** **Venue: Zoom Meeting, link to be sent after registration.** The ISA focal point for the arrangement is: Procurement Unit. E-mail: procurement@isolaralliance.org
5	10	Proposal Validity Period	90 days
6	14	Bid Security	NIL
7	41	Advanced Payment upon signing of contract	Not Allowed
8	42	Liquidated Damages	Will be imposed as follows: Provide details below if "Will be Imposed" is selected, otherwise delete the below 0.1% of contract price per day of delay:_____ Max. number of days of delay 15, (1.5% of contract amount) after which ISA may terminate the contract.
9	40	Performance Security	**Required 10% of the Contract Amount**

10	18	Currency of Proposal	**Indian Rupees or United States Dollar**
11	31	Deadline for submitting requests for clarifications/ questions	5 days before the submission deadline
12	31	Contact Details for submitting clarifications/questions	Focal Person in ISA: Procurement Unit E-mail: procurement@isolaralliance.org Address: International Solar Alliance, 3rd Floor, Surya Bhawan, NISE Campus, Gwal Pahari, Gurugram, Haryana - 122003, India
13	18, 19 and 21	Manner of Disseminating Supplemental Information to the RFP and responses/clarifications to queries	Direct communication to prospective Proposers by email
14	23	Deadline for Submission	07 March 2022 - 7.00 PM (Indian Standard Time)
14	22	Allowable Manner of Submitting Proposals	☐ **Submission by email**
15	22	Proposal Submission Address	E-mail: procurement@isolaralliance.org
16	22	Electronic submission (email) requirements	▪ Format: PDF files only ▪ File names must be maximum 60 characters long and must not contain any letter or special character other than from Latin alphabet/keyboard. ▪ All files must be free of viruses and not corrupted. ▪ Password for financial proposal must not be provided to ISA until requested by ISA ▪ Max. File Size per transmission: 5 MB
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	*April 1, 2022*

19		Maximum expected duration of contract	The contract will be for a period of 18 Months
20	35	ISA will award the contract to:	One or more Proposers, depending on the following factors : One contract will be awarded per report
21	39	Type of Contract	ISA will award one contract per report. One bidder might be awarded multiple contracts, based on the evaluation.
22		Other Information Related to the RFP	*[All other instructions and information not yet mentioned so far in this Data Sheet but are relevant to the RFP must be cited here, and any further entries that may be added below this table row]*

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
- Bid Security submitted as per RFP requirements with compliant validity period

Minimum Eligibility and Qualification Criteria

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

Subject	Criteria	Document Submission requirement
ELIGIBILITY		
Legal Status	Vendor is a legally registered entity. JV/Consortium/Sub-contract is allowed under this contract	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 ITB clause 3.	Form A: Technical Proposal Submission Form
Conflict of Interest	No conflicts of interest in accordance with 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 Contracts[1]	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

[1] Non-performance, as decided by ISA, 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.

<table>
<tr><td>Previous Experience</td><td><table>
<tr><th>Sl. No.</th><th>Criteria</th><th>Documents required</th></tr>
<tr><td>1.</td><td>Execution of minimum 3 assignments in last 5 years on assessing global perspective of solar energy for multilateral institutions/banks, central government or private organisations with a contract value of more than USD 50,000.</td><td>Provide Copies of work orders</td></tr>
<tr><td>2.</td><td>The Service Provider should have minimum ten years of experience and technical expertise in the field of solar energy.</td><td>Provide list of the projects undertaken- with start and completion date</td></tr>
</table></td><td>Form D: Qualification Form (Previous Relevant Experience)</td></tr>
<tr><td rowspan="2">Financial Standing</td><td>Minimum average annual turnover of US$ USD 500,000 for the last 3 years</td><td>Form D: Qualification Form</td></tr>
<tr><td>Bidder must demonstrate the current soundness of its financial standing and indicate its prospective long-term profitability</td><td>Form D: Qualification Form</td></tr>
</table>

Technical Proposal of Bidders who passes the minimum eligibility criteria will be evaluated.

Technical and Financial Evaluation Criteria

Summary of Technical Proposal Evaluation Forms		Points Obtainable
1.	Bidder's qualification, capacity and experience • Three reports assessing global perspective on solar energy for multilateral institutions/banks, central government or private organisations in the renewable energy sector- 100 Marks • For each additional report the bidder will get 20 marks, maximum upto 150 marks.	150
2.	Proposed Methodology, Approach and Implementation Plan	600
3.	Management Structure and Qualification of Key Personnel **Technology Report** • Team Leaders with graduate degree or equivalent graduate degree or equivalent in engineering/ energy. • Team Members with graduate degree or equivalent. **Market Report** • Team Leaders with graduate degree or equivalent graduate degree or equivalent in engineering/ energy/ business/policy. • Team Members with graduate degree or equivalent. **Investment Report** • Team Leaders with graduate degree or equivalent graduate degree or equivalent in finance/ engineering/ energy. • Team Members with graduate degree or equivalent.	250
	Total	**1000**

Section 1. Bidder's qualification, capacity and experience		Points obtainable
1.1	References of projects undertaken by the organization on "technology" / "markets and policies" / "finance and insurance" respectively over the last five years	40
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	20
1.3	Relevance of specialized knowledge. Experience on similar engagements with international organisations or associations in at least three continents over the last five years	40
1.4	Quality assurance procedures and risk mitigation measures	20
1.5	Organizational Commitment to Sustainability (mandatory weight) -Organization is compliant with ISO 14001 or ISO 14064 or equivalent – 20 points -Organization is a member of the UN Global Compact -5 points -Organization demonstrates significant commitment to sustainability through some other means- 5 points, for example internal company policy documents on women empowerment,	30

	renewable energies or membership of associations promoting such issues	
	Total Section 1	

Section 2. Proposed Methodology, Approach and Implementation Plan for the Technology Report		**Points obtainable**
2.1	Understanding of the requirement: Have the important aspects of the task been addressed in sufficient detail? Are the various ways of selecting countries and case studies convincing ?	80
2.2	Description of the Offeror's approach and methodology for meeting or exceeding the requirements of the Terms of Reference ? How many countries will be looked at for the first year, for the second year ?	80
2.3	Details on how the information shall be collected, controlled, consolidated, presented and delivered in user-friendly ways	100
2.4	Are the various ways of selecting instructive or innovative examples from various countries convincing ?	60
2.5	Do they substantially address a large scope of countries, including developing countries	80
2.6	Assessment of the implementation plan proposed including whether the activities are properly sequenced and if these are logical and realistic, over the two reporting periods (2022 and 2023)	60
2.7	Description of how the second report: 1). will bring additional information : trends during the additional year, new examples, new industrial or research stakeholders, being looked at. 2.) could be re-structured to better integrate additional information if relevant	80
2.8	Demonstration of ability to plan, integrate and effectively implement sustainability measures in the execution of the contract	60
	Total Section 2	**600**

Section 2. Proposed Methodology, Approach and Implementation Plan for the Market Report		**Points obtainable**
2.1	Understanding of the requirement: Have the important aspects of the task been addressed in sufficient detail? Are the various ways of selecting countries and case studies convincing ?	70
2.2	Description of the Offeror's approach and methodology for meeting or exceeding the requirements of the Terms of Reference ?	70
2.3	Details on how the information shall be collected, controlled, consolidated, presented and delivered in user-friendly ways	100
2.4	Are the various ways of selecting instructive or innovative examples from various countries convincing ?	80
2.5	Are the various ways of selecting relevant developing countries and getting information (trends of the various markets segments, barriers, policies) convincing ?	100

2.6	Assessment of the implementation plan proposed including whether the activities are properly sequenced and if these are logical and realistic, over the two reporting periods (2022 and 2023)	50
2.7	Description of how the second report: 1). will bring additional information : trends during the additional year, new examples, additional countries, tools and stakeholders being looked at. 2.) could be re-structured to better integrate additional information	80
2.8	Demonstration of ability to plan, integrate and effectively implement sustainability measures in the execution of the contract	50
	Total Section 2	**600**

Section 2. Proposed Methodology, Approach and Implementation Plan for the Investment Report		**Points obtainable**
2.1	Understanding of the requirement: Have the important aspects of the task been addressed in sufficient detail?	60
2.2	Description of the Offeror's approach and methodology for meeting or exceeding the requirements of the Terms of Reference ?	60
2.3	Details on how the information shall be collected, controlled, consolidated, presented and delivered in user-friendly ways	100
2.4	Assessment of the proposed implementation plan including whether the activities are properly sequenced and if these are logical and realistic, over the two reporting periods (2022 and 2023)	50
2.5	The way to review and select most relevant finance providers is being addressed	50
2.6	Are the various ways of reviewing and selecting financing tools, solutions, case studies in OECD countries convincing ?	40
2.7	Are the various ways of reviewing and selecting financing tools, solutions, case studies in emerging and low-developed countries convincing ?	60
2.8	Are the various ways of selecting relevant developing countries and getting information (investment needs, investment flows, private sector expectations) convincing ?	60
2.9	Description of how the second report: 1). will bring additional information : trends during the additional year, new examples, additional countries, tools and stakeholders being looked at. 2.) could be re-structured to better integrate additional information	80
2.10	Demonstration of ability to plan, integrate and effectively implement sustainability measures in the execution of the contract	40
	Total Section 2	**600**

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?		30
3.2	Qualifications of key personnel proposed		50
3.2 a	Team Leader		80
	- General Experience		
	- Specific Experience relevant to the assignment		
	- Regional/International experience		
	- Language Qualifications		
3.2 b	Senior Expert		50
	- General Experience		
	- Specific Experience relevant to the assignment		
	- Regional/International experience		
	- Language Qualifications		
3.2 c	Junior Expert		40
	- General Experience		
	- Specific Experience relevant to the assignment		
	- Regional/International experience		
	- Language Qualifications		
		Total Section 3	**250**

Kindly provide against each point the reference page number where narration/proof of the response to the point is provided in the bid.

Section 5. Terms of Reference (TOR) for the writing and editing of three "World Solar Annual Reports"

a. Background Information and Project Description

a) The International Solar Alliance (ISA), jointly initiated by the Governments of India and France, was launched during the 21st Conference of Parties (COP21) of the United Nations Framework Convention on Climate Change (UNFCCC), in short, the Paris Climate Change Conference, in December 2015. ISA has since transformed into an intergovernmental organization following the entry into force of its Framework Agreement on 6 December 2017, and subsequently held its Founding Conference on 11 March 2018 in New Delhi, India. By June 2021, ISA had a membership of 77 countries with a further 19 countries in the process of ratification of the Framework Agreement to become full member (2). Moreover, the amendment to the Framework Agreement opening membership to all Members of the United Nations came into effect in January 2021, opening doors for expansion of membership.

The International Solar Alliance (ISA) has hence been conceived as the global platform for cooperation to help achieve the common goals of increasing the use of solar energy in a safe, convenient, affordable, equitable and sustainable manner. At the intersection of various SDGs, particularly SDG7 (ensure access to affordable, reliable, sustainable and modern energy for all) and SDG13 (take urgent action to combat climate change and its impact), ISA works to: improve energy access; accelerate the low carbon energy transition; and ensure energy security.

b) The International Solar Alliance wishes to release each year end of August at the latest, three documents which will describe the status and the trends of solar energy worldwide :
   - The **World Solar Technology Report** will deal with all the technological aspects,
   - The **World Solar Market Report** will address the roll-out of the solar technologies in the various regions and countries, depending on the policies, incentives and barriers,
   - The **World Solar Investment Report** will review the investments done into solar assets, the future capital requirements, the main finance and insurance providers, and the tools required to deploy solar systems and services in most countries, including the less developed ones.

   These annual reports will provide facts and figures, and summarize the main advances and options to be observed at a global level, using examples and case studies from some countries or companies to illustrate the situation. They will contribute to ISA's mission to help countries, policy leaders and decision-makers in knowing the status and trends of the technologies, markets and investments globally and speeding up their solar transition while getting the best value out of it.

c) This contract will be awarded for a duration of 18 months and extendable up to 2 years without any additional cost, in order to be able to release the next two editions of one report (September 2022 and 2023).
d) Considering the specificities of each report, the bidder may apply for one, two or all three reports, depending on its own area of expertise. The bidders should highlight their preference/s in the table given in annex. The evaluation will be made separately for each report.

b. Scope

Introduction

2 See: https://isolaralliance.org/membership/countries

The climate crisis and the transition off fossil fuels should be based on a massive introduction of renewables, especially “variable renewables”, such as wind and solar energy. Yes, it means many changes, even disruptions, however more and more detailed studies show that it is the cheapest solution, coming along many positive externalities.

Content

These reports aim to make solar energy as the preferred energy source toward near-zero emissions, and to be considered as invaluable points of reference and sources of insight, providing up-to-date information and therefore assurance, trust and confidence in this fast-moving technology, market and investment environment.

These will be released annually, monitoring and keeping track of the evolutions through appropriate indicators and methodologies, reviewing guidelines and presenting “highlights of the year” and examples to all stakeholders: governments on one hand and communities, corporates, businesses, finance providers, and end-users on the other hand. They should be seen as tools, serving as a basis for dialogue, enabling international collaboration, vital to reach international climate goals.

The World Solar Technology Report will address all technology-related achievements and issues in a broad sense : a review of the current technological situation, the main trends in PV module and system designs, in solar thermal solutions, the various applications, the main stakeholders of the supply chain, alongside with the various aspects of integration, innovation, digitization, circularity and sustainability, and the various infrastructure needed. It will sum up the key figures useful within the two other reports.

The World Solar Market report will cover the deployment trends of these solar technologies : Which markets segments are the most active so far ? How the market is likely to transform in near future, depending on the country situations ? To which extent solar energy can replace fossil fuels on the long-term ? How the political will is influencing the short-term evolutions, depending on commitments, objectives, sectoral targets and therefore standards, regulations or guidelines ? How the implementing conditions such as the collaboration among, public-, private-, and social-sector leaders globally and buy-in and support from the end-users should be addressed ?

The World Solar Investment Report will survey the transition required into the financial sector : What are the various estimations of the overall investment needed ? How to speed up capital reallocation from fossil fuels to solar assets. How financial institutions and institutional investors are prioritising lending for solar? It will also review the risk mitigation solutions, the various ways of decreasing the cost of financing, especially in the debt-burdened countries and the new financial instruments for the many innovative services enabled by this decentralised source of energy.

Each of these reports will be self-standing, with its own introduction, executive summary, and list of references and annexes.

c. Approach and Methodology

The following methodology can be proposed, although the bidders may propose additional tasks or activities in line with the prescribed scope and objectives.

a) Review existing reports on similar topics, with regional or global scopes.
b) Review existing global baseline and undertake demand and supply gap analysis
c) Contact key stakeholders such as national and international associations and organisations, big players, as well as NGOs and end-users, to try to capture multiple viewpoints
d) List the main options (technologies, policies, financing tools), being currently used, or still missing if relevant,
e) Showcase some key achievements (case studies) and trends. For the second year, the examples, case studies and pictures will of course be different from the previous year.
f) End up with comprehensive reports. Detailed contents of each of the three reports are given hereafter. The proposed sections are there to review all the parameters, topics, viewpoints to be provided. The structure of the reports may be different for greater clarity, and use catchy titles.

g) Each of these reports will be self-standing, with its own introduction, 2 or 3 pages executive summary, table of contents and list of references, abbreviations, definitions and annexes. Their core content is estimated at 60 to 90 pages each.
h) The report is expected to be around 100 pages with pictures, tables, graphs etc. The bidder shall have the copyright of pictures and any other representational materials to be used in the report.
i) The bidder shall propose during the bidding stage its own outline of the report/s in detail in the methodology section of the proposal including the details given in the scope in the "Detail description of the report". Proposals without detail outline will not be accepted.

d. Deliverables and Schedules

a) Contract signing is expected to happen in April 2022.
b) The main deliverables are the reports, under digital formats : Microsoft Word, a publishing format with which the report will have been designed, plus the Excel spreadsheets of the key figures used in the report. ISA will undertake proof-reading of the document before it is published. The design format should be approved by ISA in advance. The selected contractor will provide the 2022 and 2023 releases of the reports he will have bid for by the last week of August.
c) In addition, at least three infographics per report will be provided.
d) A Powerpoint presentation of 10 to 15 slides will present the key highlights of each report.
e) A suggested promotion plan for each report, detailing pre-launch, launch and after launch promotion

e. Key Performance Indicators and Service Level

a) The bidder has to produce a quality report/s for publication accepted by ISA.
b) In case the quality of the report is not acceptable to ISA, the bidder will only be paid for the accepted deliverables.
c) On assessment of the final version of the first annual report, ISA will decide to continue or discontinue with the bidder for the second annual report to be published in 2023.

f. Governance and Accountability

a) Within the International Solar Alliance, the contractor will report to and seek approval/acceptance of output from the Additional Director General in charge of the "Knowledge Management" Cluster
b) To achieve the reports, periodic meetings will be organised bi-monthly. A first draft will be released by June 15th 2022 (or May 2023 for the second report), with a final draft provided in July, for the final modifications to be ready end of August.
c) For the selection of countries, applications and case studies, and financial institutions, to focus on, lists will be provided when appropriate to ISA for endorsement.
d) The contractor should assign a team leader for the preparation of report/s as point of contact for regular communication with ISA.
e) Each year, three coordination meetings may be decided among all the contractors (in case several are selected) in order to ensure coherence and consistency, especially regarding cost, capacity and investment projections in the future .
f) IPR for all reports and the right to data gathered will reside with ISA. Copyright provisions for all information and data shall be verified and permission obtained if required.
g) Data collection, interaction with stakeholders and any other information required for the preparation of this report shall be the sole responsibility of the contractor.

g. Facilities to be provided by ISA

- If required, ISA can provide letter of introduction to the contractor.
- If required and depending on the availability, ISA may provide existing documents/information. The contractor shall inform ISA in advance (at least 10 days) for any information required. Making information available will be the sole discretion of ISA.

h. Expected duration of the contract/assignment

Target date of commencement of contract: 1 April 2022
Target date of completion of contract: 15th September 2023

i. Duty Station

The work can be done remotely.

j. Professional Qualifications of the Successful Contractor and its key personnel

a) The selected contractor will need to have proven experience into the field of solar energy, at least for the technology and market reports. For the investment report, experience in financing energy efficiency and variable renewables will be considered.

b) The selected contractor will be used to international reporting, with references on at least 3 continents, if not global. The agency should have written in English at least three reports for international multilateral institutions/ banks, central government or private organisations or associations on solar energy in the last five years.

c) **For the technology reports**, the selected contractor will have a team with at least
- One key expert with 10 years of experience in solar energy with global perspective, the expert will also act as the Team Leader for preparation of the report. The expert should have graduate degree or equivalent in engineering/ energy.
- One expert with graduate degree or equivalent in any field with five years of experience in solar energy technology and applications with national or global perspective.

d) **For the market report**, the selected contractor will have a team with at least
- One key expert with 10 years of experience in solar energy market with global perspective, the expert will also act as the Team Leader for preparation of the report. The expert should have graduate degree or equivalent in engineering/ energy/ policy/ Business.
- One expert with graduate degree or equivalent in any field with five years of experience in solar energy market with national or global perspective.

e) **For the investment report**, the selected contractor will have a team with at least
- One key expert with 10 years of experience in energy efficiency and renewable energy financing. The expert will also act as the Team Leader for preparation of the report. The expert should have graduate degree or equivalent in Finance/ engineering/ energy.
- Two experts with graduate degree or equivalent in any field with five years of experience on sustainable energy financing each.

f) In case the bidder is bidding for two or more reports; the bidder shall identify a team leader among the professional staff outlined above.
g) The bidder should share the CV of the professionals as per the requirement highlighted above.
h) The selected company will have at least five years of existence and should have prepared three reports assessing global perspective on solar energy for multilateral institutions/banks, central government or private organisations in the renewable energy sector. A consortium with at least two companies from two different continents is also possible.

k. Timeline and Payment Terms

a) The contract price is a fixed output-based price regardless of extension of the herein specific duration.
b) The timeline for submission of the deliverable/s will be as outlined below. The same timeline will be followed if the bidder is submitting proposal for preparation of more than one report.
c) The payment will be deliverable based and for each annual report the percentage of payment will be distributed equally between the two annual publications under each category (Market, technology and Investment reports)
d) The first annual publication (under each category) is expected to be published and distributed in August 2022 and second in August 2023.

	Deliverables	Timeline for the first annual report (From the date of signing of contract)	Timeline for the second annual report	Percentage of Total Price (Weight for payment will be distributed equally for the two annual reports)
1	Submission and acceptance of Inception	2 weeks	30th October 2022	10%

	Report for the annual report			
2	Submission and acceptance of the interim draft with structure of the annual report	One Month	30th November 2022	10%
3	Submission and acceptance of the draft report with assessments and findings	4 Months (15th July)	31st May 2023	30%
4	Submission and acceptance of the final report incorporating inputs from ISA and acceptance	5 Months and Two weeks (End of August)	15th July 2023	30%
5	Submission and acceptance of designed report-10 copies and after acceptance from ISA	6 Months (Mid Sept)	15th August 2023	20%
	Total			100%

2. Detailed description of each report

2.1 : The World Solar Technology Report

Solar technologies are evolving fast, not only at the solar module or collector level but also at the systems and applications level.

This yearly report will highlight the key figures, the main achievements and the various technological options, the current trends, and the remaining challenges still to be addressed. It will cover not only the solar technologies themselves but also the enabling technologies which will be key to an optimal integration into the local ecosystems, such as digitization, storage systems, grid infrastructures, PV EV charging stations with V2G capabilities, electrolyzers for solar hydrogen production, etc. The minimum content is listed below in a table for easy reference. The bidder shall propose its own outline of the report(s) in detail in the methodology section of the proposal including the details given below. Titles may be more catchy, in accordance with the upcoming content.

Main sections	**Example of content, or more detailed objectives**	Pages
1 The current state of technology in main solar markets, including PV and thermal		
Solar production segments and their technology, PV manufacturing today	Quick reminder of the context : the overall PV market, overall cumulative installation in GW, PV power generation in TWh, PV electricity share, with more details in the market report. Annual PV production (who is producing what and where): - by technology (mc and xc-Si share of PV module production, thin-films) : absolute and percentage. - By year, over at least a 20 years period. Figures and tables : - Ingots, wafers, cells, and modules shipments per technology, per region (at least North America, Europe, China, Asia, RoW), per countries, per year in MW DC. - Similar figures for inverters, other PV components - Manufacturing capacities per regions, per processing step (from polysilicon to modules), and also per manufacturer (top 20) - Solar thermal collectors / DHW systems	4 to 6
2 Trends in solar and enabling technologies		
Solar cells	- Technologies and lab cell efficiencies over time - Lab cell records of the year : mono, multi, and other main or emerging technologies (CIGS, CdTe, Perovskites, CPV) - Trends regarding components and technologies: what's next : N-type, P-type, wafer thickness and size 166mm and 210mm, silicon usage in g/Wp, bigger Si cells, other technologies (perovskites ?), bifacial monocrystalline silicon, etc.	2 to 3
Solar modules	Efficiency of best lab modules and some commercial technologies : CdTe, multi, mono, bifacial, and best commercial Yield comparison among Perc, Perc bifacial, Topcon bifacial and heterojunction Trends and new challenges regarding sustainability : material availability, CO2 content, remaining challenges : Lead in soldering, Fluorine in backsheet, etc. Manufacturing : investment required and job created/MW of cell and	3 to 4

	module capacity	
BOS components	Trackers : technologies, costs, market share Inverters : • Review of the various inverter types (micro, string, central, bidirectional or hybrid with BESS, etc.): main features (MPPT, multi MPPTs, Arc Fault detectors), usual DC to AC ratios, and trends • Top 15 inverter manufacturers (annual shipments, trend over 5 years) • Trends : technologies, new functionalities regarding grid integration, grid services and self-production and self-consumption optimisation.	2-3
PV Systems: definitions and key figures	The main metrics to be used, and their trends (LCOE a less and less relevant metric, which metrics for IPV) : efficiency, DC, AC or additional ones, the energy payback time, the land space to generate energy, the performance ratio : evolutions over time or geographies (at least 4 various countries)	2-3
PV systems : trends	Average material consumption of utility-scale plants and for rooftop systems Time duration for permitting, for installation in three countries	
	The main large-scale system developers active or successful on global auctions (at least top ten)	
	The value of power is becoming more important that LCOE: East-West orientations, storage systems, curtailment, grid connection cost minimisation, grid services, self-consumption strategies, remote management for optimal O&M costs, especially for off-grid systems, etc.	2-3
New applications: water, desalination, cooling, hydrogen, agriculture, industry	Selected examples of applications, showcasing mainly integration and multidimensional approaches, and providing key figures (among which the costs) : Floating solar, agrivoltaics, and other types of integration Car roofs, roadways, etc. Irrigation, Cooling, solar mobility, solar parks with flexibility options or RTC capacity, hydrogen. (1st report : 5 case studies, 2nd report : > 7)	10 to 15
Enabling technologies : digitalization (smart meters, remote monitoring, open-data), grid infrastructure, storage systems	Related activities in smart distribution and transmission grids, trends in new services, with digital innovation becoming central to achieve decarbonation with energy efficiency, V2G, BESS, prepaid smart meters (1st report : 3 case studies, 2nd report : > 5)	3 to 5
Solar thermal applications : domestic	Residential sector : Solar collectors, PV + Heatpumps (1st report : 3 case studies, 2nd report : > 5)	3 to 4
Solar thermal applications : industrial processes	Industrial sector : Flat, thermal collectors, troughs, Solar thermal tower and heliostat designs molten salt for multi-day and seasonal storage (1st report : 2 case studies, 2nd report : > 3)	2 to 3
Solar thermal electricity, including PV hybridisation	Case studies in Morocco, Chile and UAE. Cost analysis : Capex, Opex, LCoE, etc.	4
The innovation needs and the	Addressing new applications: Clean cooking,	2

long-term possible technology evolutions or disruptions	or new functionalities : anti-theft options, lightweight, flexibility, self-monitoring, open-data. Local customisation	
	Solar hydrogen : utility-scale (GW) and residential (kW-100 kW) scale	2
3. Costs and prices in the various markets		
Cost and price evolutions on components: PV cells and modules	PV cells & modules cost issues : experience curve by technology Commercial prices over the past years Prices issues : volatility (decrease and unprecedented rises), and solutions. Cost of transportation (a container of freight) to Europe, America or Africa	2 to 4
PV inverters, Storage systems	Capex, Opex trends	
Prices of most types of systems	Capex and installed costs for large PV systems (ground-mounted and floating) and medium and small rooftops in at least five selected countries : in Europe, North America, Africa and Asia Cost distribution (modules, inverters, installation, grid connection) and trends, over time (ten years) for PV ground-mounted fixed, one axis tracker, C&I rooftops, residential rooftops Cost of the domestic storage option (few kWh) Cost of a utility-scale grid-connected storage system (2 to 4 hours)	2 to 4
Grid-connection costs	Cost analysis of the grid connections in at least 3 countries	1
General trends about PV electricity cost decline and importance of technology evolution and economies of scale	Past trends : • Electricity cost evolution per country over time (ten years). Importance of WACC, examples in at least five countries for: PV ground-mounted fixed, one axis tracker, C&I rooftops, residential rooftops. Cost of a 4 hour storage running at a daily cycle. • Comparison of auction prices evolution in at least 3 countries to illustrate the “auction” learning factor	3-5
	Future trends, topics of interest : • Which cost optimisation for grid-connection ? • Smart home technology to better value solar power and take advantage of excess midday solar • Ground-mounted solar versus higher-cost roof-mounted solar. Equator-oriented versus East-West orientation. • Solar plant operation and maintenance to be optimised, innovating assessment and inspection procedures	2 to 3
Solar thermal systems	Costs of several DHW systems, collective installation for multihouses buildings or district heating in several regions. Cost of systems for industrial uses in several regions	2 to 3
Solar thermal electricity	Cost analysis : Capex, Opex, LCoE, etc	1 to 2
4. Medium to long-term scenarios for solar technology development	The importance of careful transition management : Changing scale and becoming ready for growth everywhere	
Investments needed in PV	Main trends: making PV always cheaper, diversified, easily-	1-2

manufacturing, all along the value chain (from mining to recycling).	integrated, and greener. The supply side challenges with regard to the growth of manufacturing capacity : polysilicon supply, wafers, cells, modules	
	Pros and cons of local manufacturing, examples	
Circularity issues		1 – 2
Greener manufacturing	Standards and knowledge to improve Use of natural resources, material availability, sustainability issues, design for better circularity	
Higher quality, lifetime	Importance of module selection, guidelines	
Reduce the waste and Recycle the EoL products	Guidelines for greener procurement Moving to a circular economy with high recycling rates is essential in the long run and feasible.	
Ecosystem integration	Reviewing ways of system integration from a better social and environmental prospective	1
Bankability, from a technical prospective	Technical guidelines for helping in the setting up of good and investor-convincing projects	1
5. Stakeholders		
Supply chain	Need for a transparent supply chain for solar manufacturing	1
Cell and module suppliers	Main trends : consolidation versus diversification	1
Developers	Main trends (execution, operation, recycling efforts, etc.)	1
O&M suppliers	Main trends, towards cost reduction	0,5
International relationships, Trade conflicts	Supporting the industry : countries can implement policies to build a domestic manufacturing industry. Success stories on local added-value, drawbacks	1
R&D & innovation players	Current situation, public & private funding over time, main trends in OECD countries and in some emerging countries North-South and South-South cooperation, ISA Star-C programme	2 to 3
Total pages		65-85

2.2 : The World Solar Market Report

Within our need for quick decarbonation, solar energy is more and more seen as the major source of electricity and energy via hydrogen production worldwide, representing capacities in the range of 50 to 100 TW to be installed in the coming decades.

The easiest first step towards both universal access to energy and to zero emission is to build massive amounts of solar, everywhere, in all countries, within all sectors.

This **World Solar Market Report** will track the progress per region and in some countries, and propose guidelines and tools for policy-makers to open up their market or speed up the growth of their market using government incentives or law-enforced policies and get the best impacts on their citizens and local economy.

The minimum content is summed up in the following table. The bidder shall propose its own outline of the report(s) in detail in the methodology section of the proposal including the details given below. Titles may be more catchy, in accordance with the content of the sections.

Main content	**Example of content, or more detailed objectives**	Pages
1 The current state of global PV markets	**General statements, with a global overview**	
Grid connected, including BAPV, BIPV, FPV,	Current situation Solar growth right through the Covid-19 crisis showing a great overall resilience, except some specific markets. Great opportunity further growth, whether ground-mounted, floating, on rooftops and buildings, in the agricultural or the transportation sectors. (1st report : 5 case studies, 2nd report : > 7)	3 to 5
Off-grid systems in emerging markets	Still nearly 700 million people in the world with no access to electricity in their homes, and many enterprises and livelihoods lacking modern power. Minigrids, microgrids, solar home systems, solar lanterns, solar pumps are bringing reliable electricity & services to the whole world with unique benefits: reaching all remote places, quick deployment, impactful. This off-grid solar industry represents a US$x0 billion investment opportunity. (more details in the investment report) (1st report : 5 case studies, 2nd report : > 7)	2 to 3
Solar thermal systems	What are the evolutions depending on the main applications in a set of various regions / countries ? (1st report : 3 case studies, 2nd report : > 5)	2-3
Monitoring issues	Which metrics to be used on the various markets ? MW DC or AC ? Which methodologies to estimate the various markets (key ratios) in various countries ? Which guidelines for the future ?	2
Main business models	Direct investment, third-party financing (pay as a service, PPAs, etc.), grants for some niche markets, sometimes performance-based grants	2-3
2. Segmentation of the global markets		
PV installation worldwide	Annual and cumulative (20 years), per region or country, at least: China, Japan, India, rest of Asia, Germany, Rest of Europe, North America, LAC, Africa, Middle East, Pacific Where relevant, ranking of the top ten markets in each region : Amer, Apac, Europe, Africa, ME (annual market over ten years, cumulative capacity to date and cumulative capacity/inhabitant). Comments on top 20 markets + ten illustrative markets in developing countries	4 to 6
Maps, tables or curves regarding PV penetration per country (top ten OECD, top ten LDCs and SIDS	• PV generation ratio (growth over ten years) • PV + Wind generation ratio (growth over ten years) • Total capacity per inhabitant (ranking) • Annual capacity growth per inhabitant (growth over ten years) Critical analysis of the installation rate per inhabitant, the market size	1 to 2

	dynamics, and the activities by segment or sub-segment, concluding remarks	
Grid-connected applications: Size and type, technology	Distribution among residential (individual & communities), commercial & industrial rooftops, ground-mounted and floating applications, with and without storage systems. Review of the system size distribution evolution in some selected countries: China, Germany, USA, India, Japan	4-6
Off-grid systems: volume, sizes and type, applications	Nb of Solar home system sales (annual, per region) Nb (or capacity) of minigrids (annual, per region) Where off-grid segment is sizable : distribution among solar lanterns, SHS, minigrids, and productive applications (pumps, cold chains). Indications about business models used per application. And trends in the off-grid / on-grid distribution ratio. Candidate countries for such an analysis could be Cameroon, DR Congo, Ethiopia, Ghana, Ivory Coast, Kenya, Mali, Myanmar, Nigeria, Rwanda, Senegal, Tanzania, Togo, Uganda.	4-6
Solar thermal heating	Solar thermal installations worldwide, per region (annual, cumulative). Detailed applications in few countries Top ten countries : m², and m²/inhabitant, over year.	4
Solar thermal electricity generation	Capacity worldwide, per region (annual, cumulative) Case studies in Morocco, Chile and UAE. Cost analysis : Capex, Opex, LCoE, etc.	4
3. Drivers to solar markets development	Policy framework for optimal solar thermal and PV markets development	
Review of the main barriers	Examples of existing barriers : Incentives on fossil fuels, passivity of society & resistance to change, absence of legal framework, and administrative and bureaucratic barriers, lack of awareness and access to information, Passivity and low level of stakeholder support, lack of experience in carrying out social innovation projects Lack of incentives, lack of appropriate financial tools At least, two examples of country overcoming previous barriers	1 to 2
Review of the main business models, incentivizing tools and drivers	One of the key issues is to develop rules, regulation and innovative financing models to incentivise private investment in solar and redirection of fossil fuels subsidies to electricity networks and clean energy assets. Review of the main business models per application, with generic take-aways regarding past evolution and new trends • On-grid systems : FiTs, full or partial net metering, self-consumption schemes (household, collective for livelihoods, energy communities, etc.), PPAs, auctions, tax exemptions, RPS, etc. • Off-grid systems: Grants, tax reductions, loans, pay as you go, pay as a service, etc. Critical review and trend analysis in at least 5 regions Detailed distribution and critical analysis in at least 15 and 30 countries (1st and 2nd report respectively) with a zoom on PPA volumes over time and countries and auction volumes and prices of time and countries	2 to 3
Market design	Cost analysis of the grid connections in at least 3 countries	1
	Residential and ccommercial power pricing structures, Electricity wholesale markets, Review of the main tax treatments in at least 5 countries	1-2
Incentivizing examples		
- In established PV market drivers :	On buildings, Ground-M, Floating PV, Agric PV, Off-grid electrification. At least one picture and description per application	4-5

- In emerging PV market drivers :	Electrification of cities & suburbs, Edge-of-the-grid and mini-grids towards grid-connected, solar H2, solar cooking At least one picture and description per application Developing markets likely to take bigger role to drive global growth : solar energy as a game-changer in geopolitics ?	4-5
- In decarbonating hard to abate sectors	From power to mobility, heating and cooling and storage, the competitiveness of PV solutions The importance of the synergy between PV and EVs, turning both growths into grid assets. Charging stations as future offtakers for developers At least one picture and description per application	2
Environmental, Economic and Social impacts, geopolitics	Main take-aways, guidelines, and trends regarding sustainability issues, economic impacts (imports, job creation, new services and opportunities) and social impacts : safety, resilience, gender equality, justice, citizen awareness and participation, citizen investment, etc. **Example** for instance on benefit schemes offered by energy developers to provide payments to local communities that can be used for reduced energy bills	3-5
4. Global and regional forecasts	Planning what is happening is key to allow some optimisation. Forecasting is easy when it is just about a global extrapolation, much harder on a country by country basis. This section will look at some new countries and markets, their main challenges and next milestones for a five year period and a longer-term timespan.	1 to 2
At five years	Region-wise, application-wise, few examples on a selected portfolio of countries, including some emerging markets. PV installation rate in line with the necessary pace Market behaviour : the S curve, how to prevent early flattening (Germany, Japan) Evolution of the population without electricity access per region (Africa, Asia) (1^{st} report : 5 countries, 2^{nd} report : > 7)	5 to 10
For 2030, 2040, 2050,	Review of IEA, IRENA, BNEF, LUT and Stanford scenarios. How many TW for solar power, transportation, and hydrogen by 2030, 2040 and 2050 to be on a global near-zero-by-2050 high-renewables path according to these scenarios ? Regional distribution (5 regions) ? Target per inhabitant	3 to 5
Geopolitical impacts	In some sun-rich countries, markets may go from global to local, as oil and gas markets could transform to more local or regional markets for power or hydrogen. The net-zero transition provides opportunities to grow domestic industries and reduce imports of commodities like fossil fuels.	1
5. Enabling activities	Readying the TW annual market, providing guidelines for short and long-term actions	
Training	Need for training many different audiences (from decision-makers to trainers and installers) on many topics in all sectors Lack of plumbers and electricians for the day to day installation	2 to 3
Green procurement	Summary of the similar section in WSTR + means of implementation. Examples of criteria for green procurement. Approaches in at least 5 countries. China, France, India and 2 others.	1 to 2
Planning and roadmapping	<u>Rationale for planning & roadmapping</u> There is more than one pathway for a quick solar transition. Importance of a careful transition management, of being open-minded, pragmatic and	2 to 3

	delivery-focused.	
	Which activities to be performed ? Examples of guidance for action toward an orderly transition : Define overall targets, objectives, and specific ones for all sectors or industries, prepare the rules and regulations, the policy framework, providing the certainty to invest in most sectors or to divest from some conventional ones	1
	Advantages of long-term planning : attractiveness, coherence, cost optimization, local content, job creation , etc.	1
Key messages for public awareness and buy-in	Hedging against high energy prices, short installation time, more and more designs and products, independence from some infrastructures and fuel imports, job creation, etc.	1
Total pages		**60 - 85**

2.3 : The World Solar Investment Report

A massive investment increase is needed in order to build TW of solar, wind, plus electrolysers, storage systems, smart grids and grid interconnections in order to transition out of fossil fuels.

This **World Solar Investment Report** aims to be **a tool** for policy makers, public finance institutions, and public and private investors to review and monitor the current situation with the proper indicators and **to enable the scaling up of investments** into solar energy applications and the required infrastructure.

This report will start by setting the context of the overall finance needs, and by monitoring how the solar asset share is evolving. It will define what has to be considered as a solar investment (whether human, material or infrastructure), track the key figures and review the various ways to speed up investment in the solar sector:

- From the perspective of the various stakeholders: public and private finance, development banks, institutional investors, local banks, philanthropies and foundations, corporates and businesses, communities and local authorities, entrepreneurs, households, etc. Solar energy is indeed the only energy generating asset that anybody or any entity can purchase or rent and use.
- In all countries even the LDCs.

Based on facts and figures, this annual report will provide examples, stories and best practices on how to promote the urgently needed capital shift towards solar investment, looking at several directions :

- Regulation : by decreasing the attractiveness of fossil fuels or by ensuring a strong, convincing investment environment for solar energy
- Fiscal policy : by turning it from an end to a means of achieving a more global objective : energy access, job creation and local manufacturing, trade balance, etc;
- Affordability : by bringing down the financing cost of projects by mitigating the technical and non-technical risks or by engaging more local financial institutions
- Innovation : by developing new banking models and investment vehicles to make solar as affordable as any other commodities, or by proposing innovative products and service : microfinance, blockchain for power exchange, e-tendering platforms for energy infrastructure, securitisation through blockchain, crowdfunding have great potential for complementing traditional financing with regard to such a modular and decentralised source of energy.

The minimum content is summed up in the following table. The bidder shall propose its own outline of the report(s) in detail in the methodology section of the proposal including the details given below. Titles may be more catchy, in accordance with the content of the sections.

Main content	**Example of content, or more detailed objectives**	Pages
1. Basics around solar sector investment: investment costs, prices, business models and main stakeholders	Solar energy is a capital intensive energy technology, as the upfront investment is needed to cover most of the energy expenses for the next decades. Due to its extreme modularity, solar energy can be used by utilities, as any other power sources, and by any other consumers as any consumer goods. Therefore financial interactions among many stakeholders have to be reported.	
Definitions, references and taxonomy	Definition of project and corporate finance : new solar capacities and equity raising of specialized companies Definition of a solar asset : projects, companies (supply chain, developers, services), enabling grid infrastructure, accompanying measures, etc. Sustainability criteria, labelling standards, impact	2

	assessment criteria, etc. Review and critical analysis	
Summary of the key features for investors: • providing figures all along the value chain. • Explaining the main business models	• Price evolution per component and segment • Possible future developments • List of advantages key to financial institutions : cost and limited externalities, quick delivery, short investment cycles, rapid rates of growth, resilience to crisis, higher equity returns, local job creation … • Importance of demonstrating this sector's contribution towards near-zero emissions	2-3
Key technical issues ensuring better project bankability	Summary of the main criteria to be looked at, to help in identifying sustainable and unsustainable solar practices	1
Key stakeholders : finance providers and end-users	Finance providers : Banks (public, MDBs, commercial), institutional investors, asset managers, insurance and reinsurance companies, pension funds, etc. End-users : corporates, developers, municipalities, consumers (industrial, commercial and residential)	1
2. Setting the context of the current investment situation worldwide : • **Trends of global investments in the energy sector (fossil fuels, renewables, infrastructure)** • **Trends of climate finance**	Setting the context, zooming gradually from global climate and energy finance to solar investments, such as : • Total climate finance and energy-related investments worldwide : current spending on physical assets and review of the various estimations needed to reach net-zero • Fossil fuels subsidies (supply demandside, 6 trillions according to IMF), not integrating environmental costs. • Energy as a percentage of global climate finance ? • Share of investment in Renewables?	2-3
• **Volume, share and trend of solar PV and thermal investments in global markets**	Solar PV & thermal situation : • Renewable investments per year over the last ten years • Solar investments per year over the last ten years	2
3. ISA outlook : Investments needed for the transition towards zero emission	As a continuation and in coherence with Section 4 of the Market report about the market outlook, what is probable within 5 years regarding solar investments, what should be reached by 2030, 2050, etc.	
- 3.1 Short to medium term: Global and regional forecasts at 5 years in at least 5 regions	Objectives in capital spending on physical assets for the supply chain and per market segments, applications and enabling infrastructures	2-3
- 3.2 Long-term: PV development scenarios : 2030, 2040, 2050, reaching zero emissions	Objectives in capital spending on physical assets for the supply chain and per market segments, applications (including power for H2 production) and enabling infrastructures	3-4
4. Detailing the solar asset investments : where, who, what, how ?		

4.1 Global investments:		
"Where" : Investment inflows per regions / countries	Annual solar investment distribution (along >5 years) among minimum 5 regions (Amer, Europe, Middle East and Africa, APAC),: Absolute figures over time, and relative figures per GDP and per inhabitant, over time Which finance providers are active where ? Categorization and take-aways, with a specific section on LDCs	3
"Who": Investment Outflows by stakeholders - Bilateral and Multilateral Development Banks, - Institutional investors - Commercial banks - Private investors (international and domestic) - Energy producers and suppliers - End-users	Past trends in investments outflows: how much was awarded in the fields of fossil fuels, renewables and solar energy, each year, over the past five years. Under which forms : grants, loans, bonds, etc. Green bond issuance : annual volume and share allocated to solar projects Review on the main trends, Analysis of the roles, needs and preferences of each funding institution Recommendations for more accurate data collection matching each financier's need	5-7
Focus on Development Finance Institutions	Top lenders on solar assets, such as at least : AFD, AfDB, EIB, IDFC, KfW, WB. Annual investments over the last 6 years. Preferred regions and activities	
Focus on Commercial Banks	Top ten banking institutions such as at least: Sumitomo Corp, Credit Agricole, BNP Paribas, Mizuho Financial Group, Intesa Sanpaolo, Societe Generale, Misubishi UFJ Financial Group, Banco do Nordeste do Brasil, Larsen & Toubro, Natixis Annual solar investments over the last 6 years. Preferred regions and activities Role of local commercial banks for local currency financing.	
Focus on Institutional Investors	Pension funds, insurance and reinsurance companies, sovereign wealth funds, foundations and philanthropies represent a large capital pool. Annual solar investments over the last 6 years. Preferred regions and activities of the top ones.	
Insights from the private sector : developers	International developers Local developers	
Insights from the private sector : consumers	Energy producers and suppliers End-users (households, commercial, industrial)	
"What": Investment inflows per activity and tools	Main focus : - methodologies or recommendations to track and monitor who is financing which activity, - analysis and recommendations	1
Readyness, Capacity building, Awareness, Technical assistance	Amount of annual funding over >5 years allocated to the "Readyness" activities, in order to increase the pipeline of projects	1
Project Debt, and equity	Amount of annual funding over >5 years allocated to risk mitigation and to project and corporate finance.	2

Green and sustainable bonds	The main issuers, among banks and corporates Annual volume and share allocated to “energy-related” and “solar” projects	
EXCHANGE-TRADED FUNDS (ETF)	Large inflows currently coming into these instruments: Net inflows of investment into Solar ETFs (or “solar and wind”), share of “solar ETFs”, opportunity for a “solar” standard	
Green Climate Fund (GCF)	Annual volume and share allocated to “energy-related” and “solar” projects	
Supply chain (manufacturing, service companies) : amount and trends	Amount of funding allocated to strengthening the supply chain, from mining to developers and recycling.	1
VC, merge and acquisition : volume and trends	Amount of funding allocation to setting up businesses, for utility-scale applications, rooftops, and off-grid companies. Amount of capital redeployed on new opportunities At least one case study on fund-raising for service companies in developed and developing countries respectively	1-2
R&D, innovation support	Amount of public and private funding allocated to research and innovation, in order to reduce future capital and O&M costs	1-2
3.2 In some selected countries:	Zoom in the annual investment flows (large- and small-scale solar systems and enabling infrastructures) into several selected countries, representative of the main challenges	
More in-depth analysis in selected active countries:	For instance for the first report, Australia, Brazil, China, France, Germany, India, Italy, Japan, Netherlands, Spain, South Korea, USA, Vietnam + 50% more countries in the second report, to be defined later	6-10
In-depth analysis among emerging or less developed countries :	For instance for the first report : Cambodia, Dominican Republic, Egypt, El Salvador, Ghana, Kenya, Morocco, Myanmar, Nigeria, Oman, Senegal, Zambia, Zimbabwe + 50% more countries in the second report , to be defined later	5-10
Investment per PV market segment (or applications, business models)	Absolute and relative figures, per market segment, and versus GDP and access rate to energy. Risk profiles and business models per market segment Trend analysis and take-aways	2
Established PV market segments, on-grid :	1. Utility-scale and PPAs (Ground-Mounted, Floating PV, storage systems) 2. Small-scale solar : Rooftops and self-consumption (industrial, commercial, residential)	2-4
Established PV market segments, off-grid :	Solar lanterns, SHS, pumps, minigrids	2-3
Emerging PV market segments:	BIPV, AgriPV, desalination, cold chains, Solar mobility, Solar hydrogen	3-4
Enabling infrastructures (beyond PV projects)	Distribution of investments in enabling infrastructures : - Grid reinforcements to connect all the additional capacity: transmission lines, distribution grids	3-4

	- Energy storage investment for utility-scale and customer-sited projects - Smartgrids, smart meters, EVs, electrolysers, etc.	
Investment inflows per activity	debts & equity (for SPVs, supply chain), VCs, insurance & risk mitigation, preparedness and technical assistance, research and innovation	3-4
Investment inflows per stakeholder	SPVs, supply chain (manufacturers, service companies), start-ups (energy access, e-mobility, microgrids, etc.) Performance of solar energy companies	3-4
5. How to make this happen ?		
5.1 Risks and barriers to achieving more solar investments		
List of risks (technological, project, country, etc) Review of the various risk profiles per market segment and (selected) country	Investment-oriented risks : Lack of access to information needed, liquidity constraint, regulatory risk, risk perception, …	2-3
Lack of regulation	Lack of statistics and impact assessments under unified standards, lack of harmonized definition of green finance to ensure commercial sustainability, green bonds	
Understanding investor expectations or investor reluctance to commit capital to new projects/countries	Expectations : Market capitalization, dividends or overall liquidity ? Which thematic investing, which social impacts ? Examples of expectations among investors and among countries, mainly emerging countries	2 - 3
5.2 Enabling investment policies and regulatory frameworks	Listing and reviewing guidelines	
- roles of governments, banks, NGOs, and other stakeholders	Means of boosting investor interest in solar energy, including through : - Clear roadmaps - legislative landscape (guidelines to be provided: long-term signals, randomly market intervention,) - sustainable climate finance and climate-related financial disclosure, - taxonomies, green standards, enabling clear connection between green finance and solar projects - divestment campaigns	3 - 4
- Specificities for OECD countries : public-private partnerships, Corporate PPAs .	Objectives : promoting solutions and advantages (I.e. way to hedge long-term prices) At least one case study of a PPA, one regarding crowd-funding and citizen participation for some projects	2
- Specificities for low-income and emerging countries : how to deliver more capital to these countries	Objectives : Overcoming the unability to invest, or fighting underinvestment in new technologies, attracting more investment, mobilizing a new community of investors and climate finance	2 - 4

- How to bring financial support to micro-, small-, and medium-sized enterprises in developing countries		1
- Climate finance commitments	Updates on the climate finance commitments from developed countries to developing countries: which solar share ?	1 - 2
5.3 Innovation in finance and de-risking tools	Expanding the range of climate-finance products and services, for all stakeholders: Review of various options, recommendations and examples	1
Critical review of main financing initiatives	SRMI update, GFANZ, Net Zero Banking Alliance, Asset Managers initiative, Global Alliance for Banking on Values, etc	1
Review of innovative financing tools, and their trends	Third party financing or vertically integrated finance and energy company, providing guaranteed savings with no initial capex required Results-based financing Carbon contracts for difference, for improving the economic side Securitising assets using blockchain E-tendering with all project data on e-platform(s) to attract relevant investors	1
		1
Total pages		65-85

FORM FOR SUBMITTING SERVICE PROVIDER'S TECHNICAL PROPOSAL

(This Form must be submitted only using the Service Provider's Official Letterhead/Stationery[3])

[insert: Location].
[insert: Date]

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

Dear Sir/Madam:

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

A. **Qualifications of the Service Provider**

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

a) Profile – describing the nature of business, field of expertise, licenses, certifications, accreditations;
b) Business Licenses – Registration Papers, Tax Payment Certification, etc.
c) Track Record – list of clients for similar services, indicating description of contract scope, contract duration, contract value, contact references;
d) Certificates and Accreditation – including Quality Certificates, Patent Registrations, Environmental Sustainability Certificates, etc.
e) Written Self-Declaration that the company is not in the UN Security Council 1267/1989 List, UN Procurement Division List or Other UN Ineligibility List.

B. **Proposed Methodology for the Completion of Services**

The Service Provider must describe how it will address/deliver the demands of the RFP; providing a detailed description of the essential performance characteristics, reporting conditions and quality assurance mechanisms that will be put in place, while demonstrating that the proposed methodology will be appropriate to the local conditions and context of the work. A broad outline of the report/s is given in the scope of work.
The bidder shall propose its own outline of the report/s in detail in the methodology section of the proposal including the details given in the scope in the "Detail description of the report".
Proposals without table of content or the outline of the proposed report/s will not be accepted.

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

C. **Qualifications of Key Personnel**

The Service Provider must provide:

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

[Name and Signature of the Service Provider's Authorized Person]
[Designation]
[Date]

Annex

FORM FOR SUBMITTING SERVICE PROVIDER'S FINANCIAL PROPOSAL

Cost Breakdown per Deliverable*

	Deliverables	Percentage of Total Price (Weight for payment)	Price in INR or US$ (Lump Sum, All Inclusive) **Market Report (Two Annual Publications)**	Price in INR or US$ (Lump Sum, All Inclusive) **Solar Technologies Report (Two Annual Publications)**	Price in INR or US$ (Lump Sum, All Inclusive) **Investment Report (Two Annual Publications)**
1	Submission and acceptance of Inception Report	10%			
2	Submission and acceptance of the interim draft with structure of the report	10%			

3	Submission and acceptance of the draft report with assessments and findings	30%			
4	Submission and acceptance of the final report incorporating inputs from ISA and acceptance	30%			
5	Submission and acceptance. of designed report-10 copies and after acceptance from ISA	20%			
	Total	100%			

**This shall be the basis of the payment tranches*

Note : Payment against deliverables will be distributed equally for the two annual reports. For Eg. 30% payment against the deliverable- final report will be distributed euqally for the two annual reports. 15% will paid for year 1 and 15% for year 2.

Cost Breakdown by Cost Component:

- The bidder should fill the below table to highlight the report the bidder is bidding for. One bidder can submit the bid for 1 or more reports.
- The comparison of financials will be done between individual to individual or combined to combined reprort/s.
- In the financial evaluation the cost of combined reports will be taken into account for cost comparison. Bidders with lowest cost for combined reports will be given preference.

Type of Report	**Preference (Yes/No)**	**Total cost proposed for individual report (All Inclusive)**
Market Report		
Technology Report		
Investment Report		

Description of Activity **Market Report**	**Remuneration per Unit of Time** **(in INR or US$)**	**Total Period of Engagement** **(in days)**	**Total Amount** **(INR or US$)**
I. Personnel Services*			
Team Leader			
Expert			
II. Other related expenses			
Stakeholders Consultation			

Travel			
Misc			
Total			**INR**…….

Description of Activity Technology Report	**Remuneration per Unit of Time (in INR or US$)**	**Total Period of Engagement (in days)**	**Total Amount (INR or US$)**
I. Personnel Services*			
Team Leader			
Expert			
II. Other related expenses			
Stakeholders Consultation			
Travel			
Misc			
Total			**INR**…….

Description of Activity Investment Report	**Remuneration per Unit of Time (in INR or US$)**	**Total Period of Engagement (in days)**	**Total Amount (INR or US$)**
I. Personnel Services*			
Team Leader			
Expert			
II. Other related expenses			
Stakeholders Consultation			
Travel			
Misc			
Total			**INR/US$**…….

* STRUCTURE OF THE TEAM IS TO BE PROPOSED BY PROPOSER IN ACCORDANCE TO THEIR UNDERSTANDING OF THE TOR. THE BIDDER SHOULD PROVIDE ATLEAST THE NUMBER OF PROFESSIONAL STAFF AS HIGHLIGHTED IN THE SECTION 'PROFESSIONAL QUALIFICATIONS OF THE SUCCESSFUL CONTRACTOR AND ITS KEY PERSONNEL' IN THE TOR DOCUMENT.

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?	☐ Yes ☐ No If yes, [insert UGNM vendor number]
Are you an ISA vendor?	☐ Yes ☐ No
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 ISA may contact for requests for clarification during Proposal evaluation	Name and Title: [Complete] Telephone numbers: [Complete] Email: [Complete]
Please attach the following documents:	▪ Company Profile, which should not exceed fifteen (15) pages, including printed brochures and product catalogues relevant to the goods/services being procured ▪ Certificate of Incorporation/ Business Registration ▪ Tax Registration/Payment Certificate issued by the Internal Revenue Authority evidencing that the Bidder is updated with its tax payment obligations, or Certificate of Tax exemption, if any such privilege is enjoyed by the Bidder ▪ Trade name registration papers, if applicable ▪ Local Government permit to locate and operate in assignment location, if applicable ▪ Official Letter of Appointment as local representative, if Bidder is submitting a Bid in behalf of an entity located outside the country ▪ Power of Attorney

FORM C: JOINT VENTURE/CONSORTIUM/ASSOCIATION INFORMATION FORM

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

To be completed and returned with your Proposal if the Proposal is submitted as a Joint Venture/Consortium/Association.

No	**Name of Partner and contact information** *(address, telephone numbers, fax numbers, e-mail address)*	**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]

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 ISA `for the fulfillment of the provisions of the Contract.

Name of partner: _____

Signature: _____

Date: _____

Name of partner: _____

Signature: _____

Date: _____

Name of partner: _____

Signature: _____

Date: _____

Name of partner: _____

Signature: _____

Date: _____

Form D: Qualification Form

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

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

Historical Contract Non-Performance

☐ Contract non-performance did not occur for the last 3 years

☐ Contract(s) not performed for the last 3 years

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)

☐ No litigation history for the last 3 years

☐ 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 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 ISA.

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 Year Year	INR/USD INR/USD INR/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
	Information from Balance Sheet		
Total Assets (TA)			
Total Liabilities (TL)			
Current Assets (CA)			
Current Liabilities (CL)			
	Information from Income Statement		
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

Please ensure that the information below is adapted in accordance with the technical evaluation criteria included in Section 4. The below sections correspond to the sample criteria included in this template RFP in Section 4]

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 Specific organizational capability which is likely to affect implementation: management structure, financial stability and project financing capacity, project management controls.

1.3 Relevance of specialized knowledge and experience on similar engagements for fund-raising done in the region/country.

1.4 Quality assurance procedures and risk mitigation measures.

1.5 Organization's commitment to sustainability.

SECTION 2: Proposed Methodology, Approach and Implementation Plan

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

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

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

2.5 Demonstrate how you plan to integrate sustainability measures in the execution of the contract.

2.6 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	*[SUMMARIZE COLLEGE/UNIVERSITY AND OTHER SPECIALIZED EDUCATION OF PERSONNEL MEMBER, GIVING NAMES OF SCHOOLS, DATES ATTENDED, AND DEGREES/QUALIFICATIONS OBTAINED.]* [INSERT]
PROFESSIONAL CERTIFICATIONS	*[PROVIDE DETAILS OF PROFESSIONAL CERTIFICATIONS RELEVANT TO THE SCOPE OF SERVICES]* ▪ NAME OF INSTITUTION: [INSERT] ▪ DATE OF CERTIFICATION: [INSERT]

EMPLOYMENT RECORD/ EXPERIENCE	*[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.]*
	[INSERT]
	[PROVIDE NAMES, ADDRESSES, PHONE AND EMAIL CONTACT INFORMATION FOR TWO (2) REFERENCES]

REFERENCES	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)