

RFP No.: 02/01/2024/M&E/2024-ISA

**Country: India
Issued on: 11/01/2024**

Request For Proposal

**For Hiring of Consultancy firm to Develop ISA's Flagship Annual Reports: 1)
Global Trends in Solar Report and 2) Report on a specific trend**



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Secretariat, Surya Bhawan, NISE Campus,
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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 proposal shall be encrypted with password 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: Vishal Pratap

Name:

Title: Procurement Unit

Date: January 11, 2024

Section 2. Instruction to Bidders

| GENERAL PROVISIONS | |
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| 1. Introduction | <p>1.1 Bidders shall adhere to all the requirements of this RFP, including any amendments in Writing by ISA.</p> <p>1.2 Any Proposal submitted will be regarded as an offer by the Bidder and does not constitute or imply the acceptance of the Proposal by ISA. ISA is under no obligation to award a contract to any Bidder as a result of this RFP.</p> |
| 2. Fraud & Corruption, Gifts and Hospitality | <p>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.</p> <p>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.</p> <p>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.</p> <p>2.4 All Bidders must adhere to the ISA Supplier Code of Conduct, which may be found at https://isolaralliance.org/images/ISA%20Supplier%20Code%20of%20Conduct_14.4.2023.final%20version.pdf</p> |
| 3. Eligibility | <p>3.1 A vendor should not be suspended, debarred, or otherwise identified as ineligible by any UN Organization or the World Bank Group or any other international Organization. Vendors are therefore required to disclose to ISA whether they are subject to any sanction or temporary suspension imposed by these organizations.</p> <p>3.2 It is the Bidder's responsibility to ensure that its employees, joint venture members, sub-contractors, service providers, suppliers and/or their employees meet the eligibility requirements as established by ISA.</p> |
| 4. Conflict of Interests | <p>4.1 Bidders must strictly avoid conflicts with other assignments or their own interests, and act without consideration for future work. Bidders found to have a conflict of interest shall be disqualified. Without limitation on the generality of the above, Bidders, and any of their affiliates, shall be considered to have a conflict of interest with one or more parties in this</p> |

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| | <p>solicitation process, if they:</p> <ul style="list-style-type: none"> 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. <p>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. The ISA shall have the discretion to disqualify or proceed with a bidder where there is a probable conflict of interest subject to further evaluation and review of various factors such as access to sensitive information which may confer unfair advantage as against other bidders. The decision on a probable conflict of interest shall be made in the best interest of the work of the ISA.</p> <p>4.3 Similarly, the Bidders must disclose in their proposal their knowledge of the following:</p> <ul style="list-style-type: none"> 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. <p>Failure to disclose such an information may result in the rejection of the proposal or proposals affected by the non-disclosure.</p> <p>4.4 The eligibility of Bidders that are wholly or partly owned by the Government shall be subject to 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.</p> |
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PREPARATION OF PROPOSALS

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| <p>5. General Considerations</p> | <p>5.1 In preparing the Proposal, the Bidder is expected to examine the RFP in detail. Material deficiencies in providing the information requested in the RFP may result in rejection of the Proposal.</p> <p>5.2 The Bidder will not be permitted to take advantage of any errors or omissions in the RFP. Should such errors or omissions be discovered, the Bidder must notify the ISA</p> |
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| <p>6. Cost of Preparation of Proposal</p> | <p>6.1 The Bidder shall bear any and all costs related to the preparation and/or submission of the Proposal, regardless of whether its Proposal was selected or not. ISA shall not be responsible or liable for those costs, regardless of the conduct or outcome of the procurement process.</p> |
| <p>7. Language</p> | <p>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.</p> |
| <p>8. Documents Comprising the Proposal</p> | <p>8.1 The Proposal shall comprise of the following documents:</p> <ul style="list-style-type: none"> c) Documents Establishing the Eligibility and Qualifications of the Bidder; d) Technical Proposal; e) Financial Proposal; f) Proposal Security, if required by BDS; g) Any attachments and/or appendices to the Proposal. |
| <p>9. Documents Establishing the Eligibility and Qualifications of the Bidder</p> | <p>9.1 The Bidder shall furnish documentary evidence of its status as an eligible and qualified vendor, using the Forms provided under Section 6 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.</p> |
| <p>10. Technical Proposal Format and Content</p> | <p>10.1 The Bidder is required to submit a Technical Proposal using the Standard Forms and templates provided in Section 6 of the RFP.</p> <p>10.2 The Technical Proposal shall not include any price or financial information. A Technical Proposal containing material financial information may be declared non-responsive.</p> <p>10.3 Samples of items, when required as per Section 5, shall be provided within the time specified and unless otherwise specified by ISA, and at no expense to ISA</p> <p>10.4 When applicable and required as per Section 5, the Bidder shall describe the necessary training programme available for the maintenance and operation of the services and/or equipment offered as well as the cost to the 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.</p> |
| <p>11. Financial Proposals</p> | <p>11.1 The Financial Proposal shall be prepared using the Standard Form provided in Section 6 of the RFP. It shall list all major cost components associated with the services, and the detailed breakdown of such costs.</p> <p>11.2 Any output and activities described in the Technical Proposal but not priced in the Financial Proposal, shall be assumed to be included in the prices of other activities or items, as well as in the final total price.</p> <p>11.3 Prices and other financial information must not be disclosed in any other place except in the financial proposal.</p> |

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| <p>12.Proposal Security</p> | <p>12.1 A Proposal Security, if required by BDS, shall be provided in the amount and form indicated in the BDS. The Proposal Security shall be valid up to thirty (30) days after the final date of validity of the Proposal.</p> <p>12.2 The Proposal Security shall be included along with the Technical Proposal. If Proposal Security is required by the RFP but is not found along with the Technical Proposal, the Proposal shall be rejected.</p> <p>12.3 If the Proposal Security amount or its validity period is found to be less than what is required by ISA, ISA shall reject the Proposal.</p> <p>12.4 In the event an electronic submission is allowed in the BDS, Bidders shall include a copy of the Bid Security in their proposal and the original of the Proposal Security must be sent via courier or hand delivery as per the instructions in BDS.</p> <p>12.5 The Proposal Security may be forfeited by ISA, and the Proposal rejected, in the event of any one or combination, of the following conditions:</p> <ul style="list-style-type: none"> a) If the Bidder withdraws its offer during the period of the Proposal Validity specified in the BDS, or; b) In the event that the successful Bidder fails: <ul style="list-style-type: none"> i. to sign the Contract after ISA has issued an award; or ii. 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. |
| <p>13. Currencies</p> | <p>13.1 All prices shall be quoted in the currency or currencies indicated in the BDS. Where Proposals are quoted in different currencies, for the purposes of comparison of all Proposals:</p> <ul style="list-style-type: none"> a) 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. |
| <p>14. Joint Venture, Consortium or Association</p> | <p>14.1 If the Bidder is a group of legal entities that will form or have formed a Joint Venture (JV), Consortium or Association for the Proposal, they shall confirm in their Proposal that : (i) they have designated one party to act as a lead entity, duly vested with authority to legally bind the members of the JV, Consortium or Association jointly and severally, which shall be evidenced by a duly notarized Agreement among the legal entities, and submitted with the Proposal; and (ii) if they are awarded the contract, the contract shall be entered into, by and between ISA and the designated lead entity, who shall be acting for and on behalf of all the member entities comprising the joint venture.</p> <p>14.2 After the Deadline for Submission of Proposal, the lead entity identified to</p> |

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| | <p>represent the JV, Consortium or Association shall not be altered without the prior written consent of ISA.</p> <p>14.3 The lead entity and the member entities of the JV, Consortium or Association shall abide by the provisions of Clause 15 herein in respect of submitting only one proposal.</p> <p>14.4 The description of the organization of the JV, Consortium or Association must clearly define the expected role of each of the entity in the joint venture in delivering the requirements of the RFP, both in the Proposal and the JV, Consortium or Association Agreement. All entities that comprise the JV, Consortium or Association shall be subject to the eligibility and qualification assessment by ISA.</p> <p>14.5 A JV, Consortium or Association in presenting its track record and experience should clearly differentiate between:</p> <ul style="list-style-type: none"> a) Those that were undertaken together by the JV, Consortium or Association; and b) Those that were undertaken by the individual entities of the JV, Consortium or Association. <p>14.6 Previous contracts completed by individual experts working privately but who are permanently or were temporarily associated with any of the member firms cannot be claimed as the experience of the JV, Consortium or Association or those of its members, but should only be claimed by the individual experts themselves in their presentation of their individual credentials.</p> <p>JV, Consortium or Associations are encouraged for high value, multi-sectoral requirements when the spectrum of expertise and resources required may not be available within one firm.</p> |
| <p>15.Only One Proposal</p> | <p>15.1 The Bidder (including the individual members of any Joint Venture) shall submit only one Proposal, either in its own name or as part of a Joint Venture.</p> <p>15.2 Proposals submitted by two (2) or more Bidders shall all be rejected if they are found to have any of the following:</p> <ul style="list-style-type: none"> h) they have at least one controlling partner, director or shareholder in common; or i) any one of them receive or have received any direct or indirect subsidy from the other/s; or j) they have the same legal representative for purposes of this RFP; or k) 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; |

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| | <p>l) they are subcontractors to each other’s Proposal, or a subcontractor to one Proposal also submits another Proposal under its name as lead Bidder; or</p> <p>m) some key personnel proposed to be in the team of one Bidder participates in more than one Proposal received for this RFP process. This condition relating to the personnel, does not apply to subcontractors being included in more than one Proposal.</p> |
| <p>16.Proposal Validity Period</p> | <p>16.1 Proposals shall remain valid for the period specified in the BDS, commencing on the Deadline for Submission of Proposals. A Proposal valid for a shorter period may be rejected by ISA and rendered non-responsive.</p> <p>16.2 During the Proposal validity period, the Bidder shall maintain its original Proposal without any change, including the availability of the Key Personnel, the proposed rates and the total price.</p> |
| <p>17.Extension of Proposal Validity Period</p> | <p>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 and the responses shall be made in writing, and shall be considered integral to the Proposal.</p> <p>17.2 If the Bidder agrees to extend the validity of its Proposal, it shall be done without any change in the original Proposal.</p> <p>17.3 The Bidder has the right to refuse to extend the validity of its Proposal, and in which case, such Proposal will not be further evaluated.</p> |
| <p>18.Clarification of Proposal</p> | <p>18.1 Bidders may request clarifications on any of the RFP documents no later than the date indicated in the BDS. Any request for clarification must be sent in writing in the manner indicated in the BDS. If inquiries are sent other than specified channel, even if they are sent to an ISA staff member, ISA shall have no obligation to respond or confirm that the query was officially received.</p> <p>18.2 ISA will provide the responses to clarifications through the method specified in the BDS.</p> <p>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.</p> |
| <p>19.Amendment of Proposals</p> | <p>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.</p> <p>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.</p> |

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| <p>20. Alternative Proposals</p> | <p>20.1 Unless otherwise specified in the BDS, alternative proposals shall not be considered. If submission of alternative proposal is allowed by BDS, a Bidder may submit an alternative proposal, but only if it also submits a proposal conforming to the RFP requirements. 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.</p> <p>20.2 If multiple/alternative proposals are being submitted, they must be clearly marked as “Main Proposal” and “Alternative Proposal”</p> |
| <p>21. Pre-Bid Conference</p> | <p>21.1 When appropriate, a Bidder’s conference will be conducted at the date, time and location specified in the BDS. All Bidders are encouraged to attend. Non-attendance, however, shall not result in disqualification of an interested Bidder. Minutes of the Bidder’s conference will be sent to all the participants of the pre-bid conference. No verbal statement made during the conference shall modify the terms and conditions of the RFP, unless specifically incorporated in the Minutes of the Bidder’s Conference or issued/posted as an amendment to RFP.</p> |
| <p>SUBMISSION AND OPENING OF PROPOSALS</p> | |
| <p>22. Submission</p> | <p>22.1 The Bidder shall submit a duly signed and complete Proposal comprising the documents and forms in accordance with the requirements in the BDS. The submission shall be in the manner specified in the BDS.</p> <p>22.2 The Proposal shall be signed by the Bidder or person(s) duly authorized to commit the Bidder. The authorization shall be communicated through a document evidencing such authorization issued by the legal representative of the bidding entity, or a Power of Attorney, accompanying the Proposal.</p> <p>22.3 Bidders must be aware that the mere act of submission of a Proposal, in and of itself, implies that the Bidder fully accepts the ISA General Contract Terms and Conditions. https://www.isolaralliance.org/images/ISA_GTB.pdf</p> |
| <p>Email Submission</p> | <p>22.4 Email submission, if allowed or specified in the BDS, shall be governed as follows:</p> <ul style="list-style-type: none"> a) Electronic files that form part of the proposal must be in accordance with the format and requirements indicated in BDS; b) The Technical Proposal and the Financial Proposal files MUST BE COMPLETELY SEPARATE. The financial proposal shall be encrypted with password 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. |

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| | Failure to provide correct password may result in the proposal being rejected. |
| 23. Deadline for Submission of Proposals and Late Proposals | <p>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</p> <p>23.2 ISA shall not consider any Proposal that is submitted after the deadline for the submission of Proposals.</p> |
| 24. Withdrawal, Substitution, and Modification of Proposals | <p>24.1 A Bidder may withdraw, substitute or modify its Proposal after it has been submitted at any time prior to the deadline for submission.</p> <p>24.2 Manual and Email submissions: A bidder may withdraw, substitute or modify its Proposal by sending a written notice to 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"</p> <p>24.3 Proposals requested to be withdrawn shall be returned unopened to the Bidders, only for manual submissions. For online submissions, bids will be disregarded by ISA.</p> |
| 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. |
| EVALUATION OF PROPOSALS | |
| 26. Confidentiality | <p>26.1 Information relating to the examination, evaluation, and comparison of Proposals, and the recommendation of contract award, shall not be disclosed to Bidders or any other persons not officially concerned with such process, even after publication of the contract award.</p> <p>26.2 Any effort by a Bidder or anyone on behalf of the Bidder to influence 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.</p> |
| 27. Evaluation of Proposals | <p>27.1 The Bidder is not permitted to alter or modify its Proposal in any way after the proposal submission deadline except as permitted under Clause 24 of this RFP. ISA will conduct the evaluation solely on the basis of the submitted Technical and Financial Proposals.</p> <p>27.2 Evaluation of proposals is made of the following steps: n) Preliminary Examination o) Minimum Eligibility and Qualification (if pre-qualification is not done) p) Evaluation of Technical Proposals</p> |

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| | q) 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 | <p>B. Eligibility and Qualification of the Bidder will be evaluated against the Minimum Eligibility/Qualification requirements specified in the Section 4 (Evaluation Criteria).</p> <p>C. In general terms, vendors that meet the following criteria may be considered qualified:</p> <ul style="list-style-type: none"> i. They are not included in the UN Security Council 1267/1989 Committee's list of terrorists and terrorist financiers. ii. They have a good financial standing and have access to adequate financial resources to perform the contract and all existing commercial commitments, iii. 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; iv. They are able to comply fully with ISA General Terms and Conditions of Contract; v. They do not have a consistent history of court/arbitral award decisions against the Bidder; and vi. They have a record of timely and satisfactory performance with their clients. vii. The consulting firm should provide credentials, through adequate references or documentation, their current local presence in the ISA focus regions. Past experience of working with ISA and/or with multilateral/international organizations will be an added advantage. |
| 30.Evaluation of Technical and Financial Proposals | <p>30.1 The evaluation team shall review and evaluate the Technical Proposals on the basis of their responsiveness to the Terms of Reference and other RFP documents, applying the evaluation criteria, sub-criteria, and point system specified in the Section 4 (Evaluation Criteria). A Proposal shall be rendered non-responsive at the technical evaluation stage if it fails to achieve the minimum technical score indicated in the BDS. When necessary and if stated in the BDS, 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.</p> <p>30.2 In the second stage, only the Financial Proposals of those Bidders who achieve the minimum technical score will be opened for evaluation. The Financial Proposals corresponding to Technical Proposals that were rendered non-responsive shall remain unopened, and, in the case of manual submission, be returned to the Bidder unopened. For emailed</p> |

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| | <p>Proposals submissions, ISA will not request for the password of the Financial Proposals of bidders whose Technical Proposal were found not responsive.</p> <p>30.3 The evaluation method that applies for this RFP shall be as indicated in the BDS, which may be either of two (2) possible methods, as follows: (a) the lowest priced method which selects the lowest evaluated financial proposal of the technically responsive Bidders; or (b) the combined scoring method which will be based on a combination of the technical and financial score.</p> <p>30.4 When the BDS specifies a combined scoring method, the formula for the rating of the Proposals will be as follows:</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p><u>Rating the Technical Proposal (TP):</u></p> <p>TP Rating = (Total Score Obtained by the Offer / Max. Obtainable Score for TP) x 100</p> <p><u>Rating the Financial Proposal (FP):</u></p> <p>FP Rating = (Lowest Priced Offer / Price of the Offer Being Reviewed) x 100</p> <p><u>Total Combined Score:</u></p> <p>Combined Score = (TP Rating) x (Weight of TP, e.g. 80%/100) + (FP Rating) x (Weight of FP, e.g., 20%/100)</p> </div> |
| <p>31. Due Diligence</p> | <p>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:</p> <ul style="list-style-type: none"> a) Verification of accuracy, correctness and authenticity of information provided by the Bidder; b) Validation of extent of compliance to the RFP requirements and evaluation criteria based on what has so far been found by the evaluation team; c) Inquiry and reference checking with Government entities with jurisdiction on the Bidder, or with previous clients, or any other entity that may have done business with the Bidder; d) Inquiry and reference checking with previous clients on the performance on on-going or contracts completed, including physical inspections of previous works, as necessary; e) Physical inspection of the Bidder’s offices, branches or other places |

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| | <p>where business transpires, with or without notice to the Bidder;</p> <p>f) Other means that ISA may deem appropriate, at any stage within the selection process, prior to awarding the contract.</p> |
| 32. Clarification of Proposals | <p>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.</p> <p>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.</p> <p>32.3 Any unsolicited clarification submitted by a Bidder in respect to its Proposal, which is not a response to a request by ISA, shall not be considered during the review and evaluation of the Proposals.</p> |
| 33. Responsiveness of Proposal | <p>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.</p> <p>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.</p> |
| 34. Nonconformities, Repairable Errors and Omissions | <p>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.</p> <p>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.</p> <p>34.3 For Financial Proposal that has been opened, ISA shall check and correct arithmetical errors as follows:</p> <ul style="list-style-type: none"> 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 |

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| | <p>to an arithmetic error, in which case the amount in figures shall prevail.</p> <p>34.4 If the Bidder does not accept the correction of errors made by ISA, its Proposal shall be rejected.</p> |
| D. 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 the Time of Award | 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. |
| 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. |

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| <p>43. Other Provisions</p> | <p>43.1 ISA may withdraw the RFP at any time by providing written notice to the bidder in any case in which the mandate of ISA applicable to the performance of the Contract or the funding of ISA applicable to the RFP is curtailed or terminated, whether in whole or in part.</p> <p>43.2. The ISA is striving to achieve gender parity in all its activities. In this regard, female-owned organizations and/or teams with significant gender diversity are strongly encouraged to submit a proposal.</p> <p>43.3. The ISA recognizes the importance of valuing diversity and promoting inclusion in all our work programs and partnerships. The ISA strives to engage with organizations and/or teams that reflect its geographical representation and diversity.</p> |
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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 on request |
| 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 | Not Required |
| 10 | 18 | Currency of Proposal | USD |
| 11 | 31 | Deadline for submitting requests for | 5 days before the submission deadline |

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|----|---------------|---|--|
| | | clarifications/ questions | |
| 12 | 31 | Contact Details for submitting clarifications/questions | Focal Person in ISA: Procurement Unit E-mail: procurement@isolaralliance.org and CC to Ms Vardhani Ratnala vratnala@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 E-mail: procurement@isolaralliance.org and CC to Ms Vardhani Ratnala vratnala@isolaralliance.org |
| 14 | 23 | Deadline for Submission | February 02, 2024 - 7.00 PM (Indian Standard Time) |
| 15 | 22 | Allowable Manner of Submitting Proposals | <input type="checkbox"/> Submission by email |
| 16 | 22 | Proposal Submission Address | E-mail: procurement@isolaralliance.org |
| 17 | 22 | Electronic submission (email) requirements | <ul style="list-style-type: none"> ▪ Format: PDF files only ▪ File names must be maximum 60 characters long and must not contain any letter o/r special character other than from Latin alphabet/keyboard. ▪ All files must be free of viruses and not corrupted. ▪ Password for financial proposal <u>must</u> not be provided to ISA until requested by ISA ▪ Max. File Size per transmission: 5 MB |
| 18 | 27 36 | Evaluation Method for the Award of Contract | Combined Scoring Method, using the 80%-20% distribution for technical and financial proposals respectively The minimum technical score required to pass is 80%. |
| 19 | | Expected date for commencement of Contract | February 29, 2024 |
| 20 | | Maximum expected duration of contract | The Project deliverables are expected to be completed 30 weeks from the commencement of the contract. |

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| 21 | 35 | ISA will award the contract to: | One Proposer only |
| 22 | 39 | Type of Contract | Services contract |
| 23 | | 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 | A bidder is a legally registered entity/firm with not less than 12 years in service. JV/Consortium is allowed under this contract, but sub-contracting is not allowed. | Form B: Bidder Information Form |
| Eligibility | Bidder is not suspended, nor debarred, nor otherwise identified as ineligible by any UN Organization, ADB 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 Bidder that could impair its operations in the foreseeable future. | Form A: Technical Proposal Submission Form |
| QUALIFICATION | | |
| History of Non-Performing | Non-performance of a contract did not occur as a result of contractor default for the last 3 years. | Form D: Qualification Form |

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|------------------------------|--|--|--|---|
| Contracts¹ | | | | |
| Litigation History | No consistent history of court/arbitral award decisions against the Bidder for the last 3 years. | Form D: Qualification Form | | |
| Previous Experience | Sl. No. | Criteria | Documents required | Form D: Qualification Form (Previous Relevant Experience) |
| | 1. | Experience of at least five years in similar studies for multi-/bi-/international organisations | Provide two sample reports | |
| | 2. | Experience of at least ten years in renewable/solar energy | List experience – max. two pages | |
| | 3. | Have established networks and systems to carry out the research efficiently. Preference will be given to organisations who can demonstrate linkages with nodal ministries of ISA member countries for data sourcing. | Provide short description – Max. two pages | |
| | 4. | Good understanding and experience of ethical standards in research | Max. one page | |
| | 5. | Demonstrated experience in communicating research findings in innovative ways using data visualisations and | Provide max. two samples | |

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.

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| | digital infographics samples) | |
| Financial Standing | Minimum average annual turnover of USD 50 thousand cumulative over the past 3 years, and require submission of the latest 3 years of the Audited Financial Statement – income statement and balance sheet to indicate its financial stability, liquidity, credit standing, market reputation, etc. | Form D: Qualification Form |
| | Bidder must demonstrate the current soundness of its financial standing and indicate its prospective long-term profitability. | Form D: Qualification Form |

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

Technical and Financial Evaluation Criteria

| | |
|---|-------------------|
| TECHNICAL CRITERIA (for evaluation) – 80% | |
| Section 1. Bidder’s Experience | Max. Score |
| Experience of at least five years in similar studies for multi-/bi-/international organisations (<i>provide two sample reports</i>) | 5 |
| Experience of at least 10 years in renewable/solar energy (<i>list experience – max. 2 pages</i>) | 5 |
| Have established networks and systems to carry out the research efficiently. Preference will be given to organisations who can demonstrate linkages with nodal ministries of ISA member countries for data sourcing (<i>provide short description - max. 2 pages</i>) | 20 |
| Good understanding and experience of ethical standards in research (<i>describe briefly - max. 1 page</i>) | 5 |
| Demonstrated experience in communicating research findings in innovative ways using data visualisations and digital infographics (<i>provide at least two samples</i>) | 5 |
| Section 2. Proposed Methodology | |
| Quality of the proposed design, methodological rigor, implementation plan including tasks, timeline, etc. | 30 |
| Section 3. Proposed Team | |
| Composition and suitability of the proposed team – Team leader and team members with the following experience and expertise. <u>Team Leader:</u> With at least 10 years of experience in the Renewable Energy (RE) space with at least three years in a managerial role <u>Expert in RE Technologies:</u> With at least five years of experience in RE technologies <u>Expert in RE Investments:</u> With at least five years of experience in RE investments <u>Expert in RE Markets:</u> With at least five years of experience in RE markets <u>Expert in RE data:</u> With at least five years of experience in RE specific data collection, analysis and visualisation. | 10 |
| FINANCIAL PROPOSAL (for evaluation) – 20% | |
| Quality Cost Based Scoring method - QCBS | |

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

Consultancy firm to Develop ISA’s Flagship Annual Reports: 1) Global Trends in Solar Report and 2) Report on a specific trend²

I. BACKGROUND

International Solar Alliance (ISA) is an inter-governmental alliance of 116 member countries working towards increased deployment of solar energy technologies to improve energy access, energy security and facilitate energy transition. ISA supports low-carbon growth trajectories of member countries by accelerating deployment of solar. ISA Secretariat, headquartered in Delhi, India, offers services under three strategic priorities: 1) Policy & Capacity Building; 2) Programmatic Support and 3) Analytics & Advocacy. ISA has established partnerships with multilateral development banks, development financial institutions, private and public sector organisations, civil society, and other international institutions to achieve its objectives.

In accordance with the Framework Agreement of ISA, to scale up solar energy applications in member countries, the alliance works as a collective to:

- i. address common challenges in the solar sector,
- ii. take coordinated action through programmes promoting solar energy technologies, innovation, research, and development,
- iii. build capacity of member countries through trainings,
- iv. reduce the cost of finance by promoting innovative financial mechanisms and mobilizing finance from institutions,
- v. undertake advocacy on solar; research to generate knowledge; and promote networking and cooperation among member countries.

To support achievement of the above objectives, ISA comes out with an annual flagship publication ‘**Ease of Doing Solar (EoDS)**’ which was conceptualized as a report that helps track progress and take corrective actions on solar in individual member countries of the Alliance. EoDS started as a pilot in 2019 covering four countries and the latest edition - EoDS (2022) - covered 107 countries (<https://isolaralliance.org/eods2022>).

² As detailed in this Terms of Reference, the topic for the report on a specific trend will be identified in consultation with ISA each year.

As an extension to the EoDS initiative, ISA also comes out annually with the ‘**Global Trends in Solar**’ report, which presents latest developments in the global solar space such as policy and regulatory trends, technology trends, market and supply chain trends, investment and employment trends. This report serves as an executive brief which presents a global picture of the direction in which the solar industry is moving.

ISA is also developing a **Solar Data Portal** which will act as a ‘*go-to source on solar data for all*’. The portal will host datasets from EoDS and other publications of ISA (such as Global Solar Trends, Global Solar Markets, Global Solar Technology, Global Solar Investments Reports) and secondary data from external sources in user-friendly formats.

II. SCOPE of WORK

ISA is looking to contract an agency to develop the next three Global Trends in Solar Report and Reports on Specific Trends for 2023, 2024, 2025. Building on the work done so far on EoDS and Global Trends reports as mentioned above, the next set of reports are expected to be **more comprehensive and reliant on primary data**, so they present a holistic picture of the solar ecosystem and preparedness in member countries to attract and sustain investments.

The broad list of tasks to be accomplished by the hired agency under this contract are given below:

- Inception meetings with Monitoring, Evaluation and Learning (MEL) and other units at ISA Secretariat including discussions with the Solar Data Portal team.
- Comprehensive desk review of reports and datasets of ISA and other global sources to identify key datasets and data gaps.
- Based on the above points, develop a framework of key trends in solar. For each trend identify data source, frequency/availability of data, mode of data collection.
- Discuss the framework with ISA and incorporate feedback.
- For the Global Trends in Solar Report: Coordinate with relevant organisations to source secondary data.
- For the Report on a specific trend: Undertake primary research i.e., surveys to collect data on specific trends from individual member countries. The contracted agency is expected to coordinate with ISA’s National Focal Points (NFPs) and local stakeholders and visit field sites for data collection. Bidding firms are **expected to have their own network through which they can undertake data collection.**
- Conduct regional workshops to validate the collected data.

- Analyse and present key findings to ISA and member countries.
- Incorporate ISA's feedback and develop the final reports.

The contracted agency is also expected to liaise and coordinate with the agency developing the 'Solar Data Portal' to ensure that collected data and final reports are presented in user-friendly formats on the portal.

ISA expects the hired agency to undertake the following specific tasks:

1) Develop Global Trends in Solar (GTS) Reports 2024, 2025, 2026 (based on secondary research)

Global Trends in Solar Report will be an executive brief on the global state of solar energy, specifically the key trends seen in the sector and focuses on major issues such as - policy, solar tariffs, trends in investments, infrastructure, technology, gender etc. It also presents key gaps and best practices. It will be based on secondary data, as well as discussions with Member Country stakeholders.

2) Detailed report on any one trend each year in 2024, 2025, 2026 (based on primary research)

From the Global Trends Report mentioned in the point above, the hired agency is expected to identify a single trend in consultation with ISA; and research it in detail through comprehensive primary data collection. The agency is expected to identify a suitable sample and undertake a detailed primary study in ISA Member Countries on the selected topic and develop a global report on the specific trend.

Following data collection, the hired firm is expected to hold a validation workshop with experts and National Focal Points from ISA member countries. Additionally, they are expected to circulate draft reports to member countries for inputs/feedback.

3) Outreach

The contracted agency is also expected to assist ISA through the following:

- develop short five-minute videos on each annual report,
- develop 2-5page research briefs with attractive data visualisations on each annual report,
- work with the solar data portal team to ensure integration of all data collected into the portal,
- organise annual events to disseminate the reports – max. one event per year. The agency will be responsible for end-to-end management of the events.

4) Any other task assigned by the Director General of ISA

All products will be in English, well-designed, and submitted in ready-to-use/ready-to-print formats with good quality pictures/visualisations. In completing the assignment, the hired agency should ensure the following -

- Research is conducted as per UNEG Norms and Standards and using appropriate sampling methods.
- Research protocols should be developed and followed to ensure that information is collected in compliance with UNEG Ethical guidelines for Evaluation.
- Data collection staff of the hired agency should sign a 'Code of Conduct' to safeguard rights and confidentiality of the respondents. Copy of the signed code of conduct to be sent to ISA.
- All research tools, if need be, should be translated into local language(s) and data collectors should receive advance training on tools and protocols.
- ISA holds the intellectual copyright for all information collected/developed as part of this contract; and the selected firm cannot use/share any information under this contract without prior written consent from ISA.

III. DURATION

ISA expects to finish contracting by January 2024 and issue the three-year contract (from date of award), tentatively 1 February 2024 to 30 January 2027.

IV. BUDGET

Bidders are expected to provide a total budget with detailed break-up for undertaking all activities as detailed in this Terms of Reference.

V. MANAGEMENT

The hired agency will report to the M&E Specialist of ISA and is expected to independently coordinate with all relevant stakeholders, with some guidance from ISA Secretariat. The selected organisation will be responsible for all aspects of data collection including getting relevant permissions and informed consent from local authorities, institutions, and individuals to conduct the study.

The hired agency will identify a Team Leader who will be the **focal point for all discussions with ISA and be available for the entire contract duration**. S/he will be responsible for supervision, quality assurance, completion of tasks, and timely submission of deliverables. S/he will also provide monthly updates and participate in meetings. **Bidding firms are encouraged to propose team members keeping in mind their availability for the entire contract duration. Team changes would need prior consent from ISA.**

At the end of each contractual year (Feb 2025, 2026), ISA would hold a detailed review of the contracted firm, deliverables, and the proposed team i.e., changes made to the originally proposed team, that will serve as the basis for further continuation/termination of the contract.

VI. DELIVERABLES

| Activity/Deliverables | 2024 | 2025 | 2026 |
|--|---------------|---------------|---------------|
| Initial discussions with ISA staff | February | February | February |
| Desk Research | February | February | February |
| Inception report with detailed framework and methodology | March | March | March |
| Field study/Data collection | May | May | May |
| Draft reports – (GTS/Report on specific trend) | May | May | May |
| Feedback from ISA | June | June | June |
| Validation workshops | July - Aug | July - Aug | July - Aug |
| Final report | August | August | August |
| <u>Outreach</u> <ul style="list-style-type: none"> • 5-minute videos on each report • 2-5page research briefs for each report • One annual event to disseminate the reports | June-December | June-December | June-December |

The above timeframe may be modified through mutual consultation between the hired firm and ISA's M&E Specialist; however, all deliverables should be completed within the contract duration.

VII. PAYMENT SCHEDULE

| Deliverables | Payment Terms | | |
|---|------------------------------|------------------------------|------------------------------|
| | 2024 | 2025 | 2026 |
| Inception report | 20% of annual contract value | 20% of annual contract value | 20% of annual contract value |
| Draft reports of Global Trends and Single Trend | 40% of annual contract value | 40% of annual contract value | 40% of annual contract value |
| Final reports of Global Trends and Single Trend | 20% of annual contract value | 20% of annual contract value | 20% of annual contract value |
| Completion of Outreach events | 20% of annual contract value | 20% of annual contract value | 20% of annual contract value |

VIII. QUALIFICATIONS/EXPERIENCE REQUIRED

The hired firm will be selected based on their proven experience, qualifications and ability to deliver quality research and products in a timely and efficient manner. They should be able to demonstrate the following -

- Experience of at least five years in similar studies for multi-/bi-/international organisations
- Experience of at least ten years in renewable/solar energy
- Have established networks and systems to carry out the research efficiently. Preference will be given to organisations who can demonstrate linkages with nodal ministries of ISA member countries for data sourcing.
- Good understanding and experience of ethical standards in research
- Demonstrated experience in communicating research findings in innovative ways using data visualisations and digital infographics.
- Team composition: At a minimum the proposed team should have:
 - Team Leader: With at least 10 years of experience in the Renewable Energy (RE) space with at least three years in a managerial role
 - Expert in RE Technologies: With at least five years of experience in RE technologies
 - Expert in RE Investments: With at least five years of experience in RE investments
 - Expert in RE Markets: With at least five years of experience in RE markets
 - Expert in RE data: With at least five years of experience in RE specific data collection, analysis and visualisation.

Bidders are expected to propose a strong research design with methodological rigor and have an experienced team leader and team with relevant expertise as listed in the evaluation criteria below.

IX. DUTY STATION

The duty station for the assignment is New Delhi, India, however, many aspects of the work can be done remotely/using online tools. Physical presence will be mandatory for the following: Inception and Final workshops at ISA Secretariat, Validation workshops, and the annual dissemination events.

Section 6: Returnable Bidding Forms / Checklist

This form serves as a checklist for preparation of your Proposal. Please complete the Returnable Bidding Forms in accordance with the instructions in the forms and return them as part of your Proposal submission. No alteration to format of forms shall be permitted and no substitution shall be accepted. Before submitting your Proposal, please ensure compliance with the Proposal Submission instructions of the BDS 22.

Technical Proposal Envelope:

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

Financial Proposal Envelope

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

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

A: TECHNICAL PROPOSAL SUBMISSION FORM

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

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

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

- a) is not under procurement prohibition by the United Nations, including but not limited to prohibitions derived from the Compendium of United Nations Security Council Sanctions Lists;
- b) have not been suspended, debarred, sanctioned or otherwise identified as ineligible by any UN Organization or the World Bank Group or any other international Organization;
- c) have no conflict of interest in accordance with Instruction to Bidders Clause 4;
- d) do not employ, or anticipate employing, any person(s) who is, or has been an ISA staff member within the last year, if said ISA staff member has or had prior professional dealings with our firm in his/her capacity as ISA staff member within the last three years of service with the ISA;
- e) have not declared bankruptcy, are not involved in bankruptcy or receivership proceedings, and there is no judgment or pending legal action against them that could impair their operations in the foreseeable future;
- f) undertake not to engage in proscribed practices, including but not limited to corruption, fraud, coercion, collusion, obstruction, or any other unethical practice, with the ISA or any other party, and to conduct business in a manner that averts any financial, operational, reputational or other undue risk to the ISA and we *embrace the principles of the ISA Supplier Code of Conduct* https://isolaralliance.org/images/ISA%20Supplier%20Code%20of%20Conduct_14.4.2023.final%20version.pdf

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

We offer to provide services in conformity with the Bidding documents, including the ISA General Conditions of Contract and in accordance with the Terms of Reference https://www.isolaralliance.org/images/ISA_GTB.pdf

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

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

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

Name: _____

Title: _____

Date: _____

Signature: _____

[Stamp with official stamp of the Bidder]

FORM B: BIDDER INFORMATION FORM

| | |
|--|--|
| Legal name of Bidder | [Complete] |
| Legal address | [Complete] |
| Year of registration | [Complete] |
| Bidder's Authorized Representative Information | Name and Title: [Complete] Telephone numbers: [Complete] Email: [Complete] |
| Are you a UNGM registered vendor? | <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, [insert UGNM vendor number] |
| Are you an ISA vendor? | <input type="checkbox"/> Yes <input type="checkbox"/> 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: | <ul style="list-style-type: none"> ▪ Company Profile, which should <u>not</u> exceed fifteen (15) pages, including printed brochures and product catalogues relevant to the goods/services being procured ▪ Certificate of Incorporation/ Business Registration ▪ Tax Registration/Payment Certificate issued by the Internal Revenue Authority evidencing that the Bidder is updated with its tax payment obligations, or Certificate of Tax exemption, if any such privilege is enjoyed by the Bidder ▪ Trade name registration papers, if applicable ▪ Local Government permit to locate and operate in assignment location, if applicable |

- Official Letter of Appointment as local representative, if Bidder is submitting a Bid in behalf of an entity located outside the country
- Power of Attorney

FORM C: JOINT VENTURE/CONSORTIUM/ASSOCIATION INFORMATION FORM

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

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

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

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

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: _____ | Name of partner: _____ |
| Signature: _____ | Signature: _____ |
| Date: _____ | Date: _____ |
| Name of partner: _____ | Name of partner: _____ |
| Signature: _____ | Signature: _____ |
| Date: _____ | Date: _____ |

FORM D: QUALIFICATION FORM

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

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

Historical Contract Non-Performance

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

Litigation History (including pending litigation)

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

Previous Relevant Experience

Please list only previous similar assignments 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 | USD |
| | Year | USD |
| | Year | USD |
| Latest Credit Rating (if any), indicate the source | | |

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

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

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

FORM E: FORMAT OF TECHNICAL PROPOSAL

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] |

| | |
|--|--|
| <p>EDUCATION/ QUALIFICATIONS</p> <hr/> | <p><i>[SUMMARIZE COLLEGE/UNIVERSITY AND OTHER SPECIALIZED EDUCATION OF PERSONNEL MEMBER, GIVING NAMES OF SCHOOLS, DATES ATTENDED, AND DEGREES/QUALIFICATIONS OBTAINED.]</i></p> <hr/> <p>[INSERT]</p> |
| <p>PROFESSIONAL CERTIFICATIONS</p> <hr/> | <p><i>[PROVIDE DETAILS OF PROFESSIONAL CERTIFICATIONS RELEVANT TO THE SCOPE OF SERVICES]</i></p> <hr/> <ul style="list-style-type: none">▪ 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)

FORM F: FINANCIAL PROPOSAL SUBMISSION FORM

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

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

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

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

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

Name: _____

Title: _____

Date: _____

Signature: _____

[Stamp with official stamp of the Bidder]

FORM G: FINANCIAL PROPOSAL FORM

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

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

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

Table 1: Summary of Overall Prices

| | Amount(s) |
|--|--|
| Professional Fees The lump-sum amount to be quoted with the inclusion of all costs associated with the successful completion of this assignment as per the TOR | All Bidders shall quote only one price |
| Other Costs (If any) | |
| Total Amount of Financial Proposal | |

