



Anguilla Renewable Energy Programme (AREP)
Ministry of Infrastructure, Communications, Utilities, Housing & Tourism
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DEADLINE EXTENDED

REQUEST FOR PROPOSALS

Consulting Firm to Develop EE/RE Curriculum and Conduct Energy Sector Capacity Building Towards Anguilla's Sustainable Energy Transition

- Deadline for submission of requests for clarification: Friday, February 23rd, 2024, at 4:00 pm (-4GMT)
- Deadline for submission of proposals: Friday, March 8th, 2024, at 4:00 pm (-4GMT)



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Letter of Invitation

Dear Sir/Madam:

The Government of Anguilla, through the project "*Streamlining Anguilla's Energy Sector Towards a More Sustainable Future*", has committed funds towards the cost of these services to be procured under **Consulting Firm to Develop EE/RE Curriculum and Conduct Energy Sector Capacity Building Towards Anguilla's Sustainable Energy Transition** and intends to apply the funds to eligible payments under this contract.

The Ministry of Infrastructure Communications Utilities, Housing and Tourism now invites proposals to provide these consulting services. More details on the required services are provided in the Terms of Reference.

This Request for Proposal (RFP) may not be transferred to any other firm.

A firm will be selected using the criteria and methods listed within this RFP. The RFP includes the following documents:

- Section 1 - Letter of Invitation
- Section 2 - Schedule A: Instructions to Proposers
 - Schedule B: Proposal Data Sheet
 - Schedule C: Standard Forms of Contract
 - Schedule D: Terms of Reference
 - Schedule E: Technical Proposal - Standard Forms
 - Financial Proposal - Standard Forms

Yours sincerely,

Travis Carty (Mr.)
Director of Public Utilities, Technology & Information Security
Ministry of infrastructure, Communications, Utilities, Housing and Tourism
Email: travis.carty@gov.ai





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SCHEDULE A

INSTRUCTION FOR PROPOSERS

1.0 DEFINITIONS

In these Proposal Documents the following terms shall have the meanings indicated:

“Addenda” means addenda to this Request for Proposal issued by the GOA from time to time. Addenda may be issued to amend, alter, clarify, add to or remove from the form and contents of the Request for Proposal or to effect modifications to the Request for Proposal.

“Closing Date” means the last date for submission of Proposals as specified in the Conditions of Proposing or such later date as may be notified in an Addendum issued by the GOA.

“Closing Time” means the last time for submission of Proposals as specified in the Conditions of Proposing or such later time as may be notified in an Addendum issued by the GOA.

“Conditions of Proposing” means the conditions of proposal set out in this document.

“Confidential Information” includes all information not in the public domain (otherwise than through breach of the confidentiality requirements of the Conditions of Proposing) provided by the GOA or a Proposer to the other.

“Consultant” means any entity or person that may provide or provides the Services to the Procuring Entity under the Contract.

“Contract” means the Contract signed by the Parties and all the attached documents listed in its Clause 1, that is the General Conditions (GC), the Special Conditions (SC), and the Appendices.

“Data Sheet” means such part of the Instructions to Consultants used to reflect specific country and assignment conditions.

“LOI” (Section 1 of the RFP) means the Letter of Invitation being sent by the Procuring Entity to the short-listed Consultants.

“Request for Proposal” means all the documents issued by the GOA which are referred to in Clause 1.2 below.

“Proposal” includes any response to the Request for Proposal signed by the Proposer comprising the Proposal Return Schedules and all required documentation and information.

“Proposer” means a person or corporation who submits a Proposal in accordance with this Request for Proposal.

“Proposal Evaluation Committee” means a committee appointed by the Procurement Committee to evaluate Proposals.

“Section” means an identified Section of the Proposal Documents.

“Services” means the work to be performed by the Consultant pursuant to the Contract.

“Sub-Consultant” means any person or entity to whom the Consultant subcontracts any part of the Services.

“Terms of Reference” (TOR) means the document included in the RFP as Section 5 which explains the objectives, scope of work, activities, tasks to be performed, respective responsibilities of the Procuring Entity and the Consultant, and expected results and deliverables of the assignment.

“Two-envelope Proposal Submission” means the Technical Proposal should be separate and marked “Technical” and the Financial Proposal should be separate marked “Financial.”

2.0 STRUCTURE OF THE PROPOSAL DOCUMENTS

Proposal documents have been structured to allow easy reference. Any questions should be directed in writing to the Project Administrator via email at AREP@gov.ai.

2.1 Request for Proposal

The Request for Proposal is made up of the following **FIVE (5)** parts in the order of precedence as listed:

2.1.1 Section 1: Letter of Invitation

2.1.2 Section 2:

2.1.2.1 Schedule A - Instructions to Proposers

This Section gives the background to and an overview of the requirements of the Contract and the type of response sought from Proposers.

2.1.2.2 Schedule B – Data Sheet

This Section specifies the proposal process and conditions of proposing and describes the selection criteria that will be applied in the evaluation of proposals received.

2.1.2.3 Schedule C –Standard Conditions of Contract

This Section comprises the Conditions of Contract - including a proposed agreement which is expected to form the basis of the Contract.

2.1.2.4 Schedule D –Terms of Reference/Scope of Services

This Section explains the objectives, scope of work, activities, tasks to be performed, respective responsibilities of the Procuring Entity and the Proposer, and expected results and deliverables of the assignment.

2.1.2.5 Schedule E -Proposal Return Schedules

This Section comprises the Proposal Return Schedules on which proposal responses must be submitted.

2.2 Addenda

- (a) Addenda may be issued at any time prior to the closing date. Each addendum will be issued to all Proposers and, upon issue, will form part of the Proposal Documents.
- (b) Receipt of each addendum must be acknowledged by the Proposer by signing a statement in the Proposal Return Schedules.
- (c) Any of the Proposal Documents may be amended to reflect the requirements of any addenda.

Expressions and words used in the Proposal Documents have the meanings ascribed to them in **Clause 1** of the Instructions for Proposers and in the Conditions of Contract (**Schedule C** of the Proposal Documents).

2.1 Precedence of Documents

To the extent that there is any inconsistency between:

- (a) Any addenda and the other Proposal Documents, the addenda shall prevail.
- (b) If two or more addenda are issued in relation to a matter, the last issued addenda shall prevail.

3.0 GENERAL

3.1 Source of Funds

The Government of Anguilla has received funding from the European Union (EU) and Expertise France (EF) to support its climate change mitigation activities through the international program known as RESEMBID- the Resilience, Sustainable Energy, and Marine Biodiversity Programme. The national project, “*Streamlining Anguilla’s Energy Sector Towards a More Sustainable Future*” being supported under RESEMBID will promote clean energy, and decentralized electricity solutions in Anguilla.

Funds from the project have been committed towards the costs of these services to be procured and to be applied to eligible payments under the contract.

Either the estimated number of Professional staff-months/staff-days or the budget for completing the assignment shall be shown in the Data Sheet, but not both. The Proposal shall, however, be based on the number of Professional staff-months or on the budget as estimated by the Consultants.

In the case of fixed-budget-based assignments, the available budget is shown in the Data Sheet but the estimated number of Professional staff-months shall not be included. In this case, the Financial Proposal shall not exceed the stated budget.

Alternative professional staff shall not be proposed and only one curriculum vitae (CV) should be submitted for each position.

3.2 Request for Proposals

The Procuring Entity named in the Proposal Data Sheet invites qualified persons or corporations to submit proposals to provide the Services as described in the Terms of Reference/Scope of Services to the GOA upon the conditions set forth in the Conditions of Contract.

The Proposal will comprise the Proposal Return Schedules (Schedule E) duly completed by the Proposer and any other relevant addenda submitted with Proposal.

The Proposer shall sign the Proposal, or if the Proposer is a corporation, execute the Proposal in a manner binding the corporation.

The Proposer may attach to the Proposal Return Schedules any additional documentation in support of its Proposal.

The GOA is not bound to accept the lowest of any proposals.

This Request for Proposals may be cancelled or rejected without any liability to GOA.

3.3 Pre-Proposal Conference

The GOA will conduct a Pre-Proposal Conference for all Proposers, if one is specified in the Data Sheet, for the purpose of publicly discussing the proposal Terms of Reference, local conditions relevant to the contract, scope of all services, and any other matters deemed appropriate by the GOA or prospective Proposers. All questions concerning these matters should be addressed at this meeting for the equal benefit and

knowledge of all Proposers. The GOA will not discuss any of the above matters with individual Proposers.

3.4 Services arrangements and Service Standards

This is a contract for the procurement of services as outlined in Schedule D – Terms of Reference/Scope of Services. The successful Proposers' responsibilities are as set out in Schedule D.

Proposers should read the Terms of Reference/Scope of Services fully to ascertain the exact nature of the work to be performed, and the terms on which it is to be performed, as the agreement will be evidenced solely by the Contract.

Proposers **MUST** complete and return the Proposal Return Schedules and may attach supporting documentation.

3.5 Proposer to be Informed.

- a) Proposers shall, prior to submitting their Proposal, become acquainted with the nature and extent of the Contract and the Services to be undertaken, and make all necessary examinations, investigations, inspections and deductions.
- b) **No** claims arising from a failure to take any such actions will be considered and the GOA does not accept any responsibility if a Proposer fails to make its own enquiries, interpretations, deductions and conclusions when preparing its Proposal.
- c) It is the responsibility of Proposers to ensure that they have sufficient and complete information to prepare their Proposals. Proposers should therefore familiarize themselves with local conditions and take these into account in the preparation of their Proposals. Once Proposals have been submitted, no claims that information is missing or incomplete will be accepted.
- d) Proposers are expected to be familiar with all regulatory requirements relating to the Services and the elements necessary to perform the Services.

This includes the extent, if any, of any licences and/or permits necessary to carry out the services.

- e) Proposers must form their own assessment of the total requirement of materials necessary to perform the true intent of the proposed Contract and of the conditions, difficulties and hazards that may affect the performance of the Services.
- f) The GOA will accept **NO** responsibility for Proposers' failure to make their own enquiries, interpretations and conclusions from information contained within the Proposal Documents or otherwise.
- g) The Proposer assumes certain risks during the term of the Contract, including but not limited to:
 - (a) Assumptions of waste quantities may not be realized during the life of the Contract.
 - (b) Impediments due to natural causes.

3.6 Discrepancies and Omissions

Should a Proposer find discrepancies, errors and/or omissions, contradictions or ambiguities or conflicts with applicable law in the Request for Proposals (Schedules A, B, C, D, E), or should there be any doubt as to their meaning, the Proposer should at once notify the Project Administrator in writing at AREP.gov.ai on or before the close of the clarification period.

3.7 Enquiries

Any enquiries regarding the services specified in the Proposal Documents should be directed in writing, at least 1 week before the date indicated in the Proposal Data Sheet, to the Project Administrator at AREP.gov.ai.

No statement made by the Project Administrator should be construed as modifying these Conditions of Proposing or any other Proposal Documents, unless confirmed in writing by the Project Administrator.

3.8 Extension of Time for the Submission of All Proposals

The GOA, at its absolute discretion, may extend the closing date for the submission of all Proposals if warranted by the issue of an addendum to the original Proposal Document. Any extension will be published on GOA website www.gov.ai and a written notice will be issued to all persons or entities which have acknowledged receipt of the original Proposal Document through invitation.

3.9 Proposer Not to Solicit the GOA and their Advisors

The Proposer and its representatives must not interfere or attempt to interview or to discuss this Proposal with GOA or employees and agents of the GOA, other than the Project Administrator or his/her designate.

The GOA reserves the right to reject any Proposal submitted by a Proposer which contravenes this Clause.

3.10 Procuring Entity Input(s)

The Procuring Entity will, in a timely manner, provide the successful Consultant with the inputs and facilities specified within the Data Sheet.

3.11 Contractor's Performance Measures

The Conditions of Contract sets out the Aims and Objectives of this Contract. Measures that will be adopted to assess the Contractor's performance under the Contract are set out in the Schedule D – the Terms of Reference/Scope of Services – including details of any financial consequences of not meeting performance standards.

3.12 Procuring Entity Input (s)

The Procuring Entity will, in a timely manner, provide the successful Consultant with the inputs and facilities specified within the Data Sheet.

4.0 ROPOSAL PREPARATION AND SUBMISSION

4.1 Conforming Proposals

To submit a conforming Proposal, the Proposer must:

- a) Comply with all the requirements contained in the Proposal Documents.
- b) Complete and execute all the Proposal Return Schedules relevant to its offer in the manner indicated.

4.2 Non-Conforming Proposals

A non-conforming Proposal is one that does not comply with all the requirements of **Clause 2.1**. The GOA shall not consider a nonconforming Proposal.

4.3 Proposal Preparation

Proposals should be prepared using the attached standard forms (see Schedule E). All activities and items described in the Technical Proposal must be priced separately in the Financial Proposal. Activities and items 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.

4.4 Proposal Receipt and Submission

The Proposal, as well as any related correspondence, should be completed in English and all prices should be quoted in **USD** and **EUROS**.

The Consultants are invited to submit a Technical Proposal and a Financial Proposal, as specified within the Data Sheet - for consulting services required for the assignment named within the Data Sheet. The Proposal will be the basis for contract negotiations and ultimately for a signed contract with the selected Consultant.

Proposals must be submitted to the address indicated in the Proposal Data Sheet no later than the time and the date indicated in the Proposal Data Sheet, or any extension to this date in accordance with any alternative date stated within any Addenda. Any proposal received by the Procuring Entity after the deadline for submission shall not be considered. Consultants may only submit one proposal. If a Consultant submits or participates in more than one proposal, such proposals shall be disqualified. However, this does not limit the participation of the same Sub-Consultant, including individual experts, to more than one proposal.

4.5 Electronic Proposals

Only proposals submitted by e-mail **will** be accepted.

4.6 Late Proposals

Proposals received after the Closing Time on the Closing Date **will not** be accepted.

5.0 ACKNOWLEDGMENT BY PROPOSER

The Proposer acknowledges that:

- (a) The GOA makes no representations and offers no undertakings in issuing this Proposal.
- (b) The GOA is not bound to accept the lowest Proposal or required to accept any Proposal.
- (c) The GOA may suspend, vary, postpone, terminate, or abandon the Proposal process.
- (d) The GOA may extend the bid validity period stated within this proposal document.
- (e) The GOA may negotiate with the responsible proposer who submitted the lowest responsive evaluated Proposal for the purpose of increasing or decreasing the scope or value of the proposed contract.
- (f) The GOA may discontinue negotiations with any Proposer.
- (g) The GOA may require one or more Proposers to supply further information, for the sole purpose of clarifying any aspect of their Proposal. Any such Invitation is not an opportunity to amend a Proposal submitted.
- (h) The Proposal Submission cannot be withdrawn without the consent of the GOA unless it is withdrawn in writing before the Closing Time by submitting a notice of withdrawal to the Project Administrator in accordance with the stipulations of the Proposal Data Sheet.
- (i) The Evaluation Committee and the GOA may undertake “due diligence” checks, including, but limited to, verifying references and/or referees, and undertaking company searches and credit checks.
- (j) The GOA will not be responsible for any costs or expenses incurred by a Proposer arising in any way from the preparation and submission of Proposals.
- (k) The GOA accepts no responsibility for a Proposer misunderstanding or failing to respond correctly to this Proposal.
- (l) Where information is supplied in Proposal Documents regarding historical quantities and activities, this is offered on the basis that such information is believed by the GOA to be complete and correct at the time of its compilation.
- (m) Submission of a Proposal shall be deemed as acceptance that the GOA will conduct a Criminal Record Background (CRB) check.
- (n) Submission of a Proposal shall be deemed as an acknowledgement by the Proposer that all obligations stipulated within the RFP will be met and, unless otherwise specified, the Proposer has read, understood and agreed to all the instructions in the RFP.
- (o) Successful Proposer shall not be allowed to bid on works or services directly or indirectly related to this proposal.

6.0 AGREEMENT

The successful Proposer will be required to **execute two (2) copies** of a Formal Instrument of Contract evidencing the parties’ agreement, incorporating the terms of the Contract being Section C – Conditions of Contract, Section D – Terms of Reference/Scope of Work and relevant parts of the Proposer’s Proposal Return Schedules within **2 to 3 business** days of these documents being presented to the Proposer for execution.

If the Formal Instruments of Agreement are not executed by the successful Proposer and returned to the GOA, together with any payment or security, within the **3 business** day period, the GOA may:

- (a) Treat that failure as a breach constituting a repudiation of the binding agreement created by the GOA's acceptance of the successful Proposer's Proposal and accept that repudiation.
- (b) Terminate the agreement.
- (c) Recover any damages arising from the repudiation by the Proposer.

Should the successful proposer neglect to execute a contract, the Board may accept the Proposal of and award a contract to the responsible proposer who submitted the next lowest responsive evaluated Proposal.

7.0 USE OF SUBCONTRACTORS

Subject to the Evaluation Criteria in the **Proposal Data Sheet** the preference is for the Services to be undertaken using resources from the Proposer's organization.

Where a Proposer proposes to provide any part of the Services using resources from organizations other than the Proposer itself, substantial information relating to the contractual arrangements for such resources must be detailed in the Proposal, together with information on the relevant experience and financial standing of such other organization and relevant personnel.

Failure to provide such information may result in the Proposal being excluded from further consideration.

Subcontractors will be required to satisfy the terms and conditions of these Proposal Documents and will be required as a condition of their acceptance by the GOA to comply with all relevant conditions of the Contract.

Proposers will be required to ensure that subcontractors satisfy the terms and conditions of the Proposal Documents and to include all relevant conditions of the contract in subcontracts. Proposers will be held liable for any failure to perform by the subcontractor.

8.0 ACCEPTANCE OF PROPOSAL

The Government of Anguilla will select a consulting firm/organization (the consultant), in accordance with the selection method specified within the Data Sheet.

The successful Proposer will be notified in writing of the acceptance of its Proposal. Unsuccessful Proposers will be upon completion of the contract negotiation with the successful Proposer.

9.0 PROBITY OF PROPOSAL PROCESS

Statutory Declaration is included in the Proposal Return Schedules which addresses "**Collusive Bidding**". Such declaration must be made and returned as part of the Proposal. Should any Proposer consider that the Proposal process has failed to accord it fair right to be considered as a successful Proposer, or that it has been prejudiced by any breach of these Conditions of Proposal or other relevant principle affecting the Proposals

or their evaluation, the Proposer must immediately and in writing notify the alleged failure or breach to the Project Administrator of the GOA.

Notification must set out the issues in dispute, the impact upon the Proposer's interests, any relevant background information and the outcome desired. Delay in notification of probity breach, or notification after the announcement of the successful Contractor will preclude a Proposer from relying upon or acting based upon such breach.

10.0 PROVISION OF INFORMATION BY PROPOSERS

10.1 Proposal Return Schedules

Proposers are required to complete the Proposal Return Schedules and submit these as part of their Proposal. They should also supply any information or documents specified at the conclusion of the Schedules. While such information may be used in evaluation of Proposals, it will not necessarily form part of the Contract.

10.1.1 The Technical Proposal shall include the Technical Proposal Return Forms (see Schedule E) and shall NOT include any financial information.

10.1.2 The Financial Proposal shall be prepared using the attached Financial Proposal Return Forms (see Schedule E). It shall list all costs associated with the assignment, including (a) remuneration for staff (foreign and local, in the field and at the Consultants' home office), and (b) reimbursable expenses indicated in the Bid Data Sheet. If appropriate, these costs should be broken down by activity and, as appropriate, into foreign and local expenditures. All activities and items described in the Technical Proposal should be priced separately. Activities and items described in the Technical Proposal but not priced, shall be assumed to be included in the prices of other activities or items.

10.2 Information for Evaluation

Proposers are required to submit all the documents or information specified with their Proposals.

Proposers may submit additional information in support of their Proposal as may be considered necessary for evaluation of any methods, systems, processes, personnel, plant or equipment they propose to use in the performance of the Contract. The GOA reserves the right to clarify with any Proposer the contents of any information.

Proposers must complete all relevant Proposal Return Schedules in Section E, to provide the GOA with the information required to fully and fairly evaluate the Proposal.

11.0 CONFLICT OF INTEREST

Government of Anguilla requires that Consultants provide professional, objective and impartial advice and at all time hold the Government of Anguilla's interests paramount. The Government of Anguilla requires that Consultants strictly avoid conflicts with other

assignments or their own corporate interests and act without consideration for future work.

- 11.1** Without limitation on the generality of the above statements, Consultants, and any of their affiliates, shall be considered to have a conflict of interest under any of the circumstances set forth below:

Conflicting Activities: If the Consultant, and/or any of its affiliates, has been engaged by the Government of Anguilla to provide goods, works or services other than consulting services for a project, the Consultant shall be disqualified from providing consulting services related to those goods, works or services. Similarly, a Consultant, and any of its affiliates, hired to provide consulting services for the preparation or implementation of a project shall be disqualified from subsequently providing goods or works or services other than consulting services resulting from or directly related to the consulting services identified above. For the purpose of this paragraph, ‘services other than consulting services’ are defined as those leading to a measurable physical output, for example surveys, exploratory drilling, aerial photography, and satellite imagery.

Conflicting Assignments: A Consultant, or any of its affiliates - including Personnel and Sub-Consultants – shall not be contracted for any assignment that, by its nature, may conflict with another Government of Anguilla assignment for which the Consultant is contracted. For example:

- a) a Consultant hired to prepare engineering design for an infrastructure project shall not be engaged to prepare an independent environmental assessment for the same project;
- b) a Consultant assisting Government of Anguilla in the privatization of public assets shall not purchase, nor advise on, such assets;
- c) a Consultant hired to prepare Terms of Reference for an assignment shall not be hired for the assignment in question.

Conflicting Relationships: A Consultant - including its Personnel and Sub-Consultants - that has a business or family relationship with a member of the Procuring Entity’s staff who is either directly or indirectly involved in any part of

- a) the preparation of the Terms of Reference of the assignment;
- b) the selection process for such assignment; or
- c) supervision of the Contract

may not be awarded a Contract, unless the resulting conflict has been resolved - throughout the selection process and the execution of the Contract - in a manner acceptable to the Government of Anguilla.

No agent or current employee of Government of Anguilla shall work as a Consultant under his/her own Ministry, Department or Agency. Recruitment of former

government employees to work for their former Ministries, Departments or Agencies is acceptable provided no conflict of interest exists.

Proposers must inform the GOA of any circumstances or relationships which will constitute an actual or potential conflict that impacts, or may reasonably be perceived to impact, their ability to serve the best interest of GoA if the Proposer is awarded the contract.

If any conflict or potential conflict exists the Proposal should advise how the Proposer proposes to address this.

12.0 EVALUATION CRITERIA

12.1 Proposal Evaluation

From the time the Proposals are opened to the time the contract is awarded, the Consultants should not contact the Government of Anguilla on any matter related to its Technical and/or financial proposal(s). Any effort by consultants to influence the Government of Anguilla in the examination, evaluation, ranking of Proposals and recommendation for award of Contract may result in the rejection of the Consultants' Proposal.

12.2 Evaluation of Technical Proposals

The Evaluation Committee shall evaluate the Technical Proposals on the basis of their responsiveness to the Terms of Reference, applying the evaluation criteria, sub-criteria and point system specified in the Data Sheet. Each responsive Proposal will be given a technical score (St). A Proposal shall be rejected at this stage if it does not respond to important aspects of the RFP, and particularly the Terms of Reference or if it fails to achieve the minimum technical score indicated in the Data Sheet.

12.3 Financial Proposal for QSB

Following the ranking of technical proposals, when selection is based on Quality only (QBS), the first ranked Consultant is invited to negotiate its Proposal and the Contract in accordance with the instructions given under paragraph 12.5 of these instructions.

12.4 Public Opening and Evaluation of Financial Proposals (only for QCBS, FBS, LCS)

- a) After the technical evaluation is completed the Procuring Entity shall notify those Consultants whose Proposals did not meet the minimum qualifying mark or were considered non responsive to the RFP and TOR, that their Financial Proposals will be returned unopened after completing the selection process. Where possible the financial proposals should be opened publicly. In this case, the Procuring Entity shall simultaneously notify in writing Consultants that have secured the minimum qualifying mark, of the date, time and location for opening of the Financial Proposals. The opening date should allow Consultants sufficient time to make arrangements for attending the opening. Consultants' attendance at the opening of Financial Proposals is optional.
- b) Financial Proposals shall be opened publicly in the presence of the Consultants' representatives who choose to attend. The name of the Consultants, and the technical scores of the Consultants shall be read aloud. The Financial Proposal of the Consultants who met the minimum qualifying mark will then be inspected to confirm that they have remained sealed and unopened. These Financial Proposals shall be then opened, and the total prices read aloud and recorded. Copy of the record shall be sent to all Consultants.

- c) The Evaluation Committee will correct any computational errors. When correcting computational errors, in case of discrepancy between a partial amount and the total amount, or between word and figures the formers will prevail. In addition to the above corrections, as indicated under para. 3.6, activities and items described in the Technical Proposal but not priced, shall be assumed to be included in the prices of other activities or items. In case an activity or line item is quantified in the Financial Proposal differently from the Technical Proposal, (i) if the Time-Based form of contract has been included in the RFP, the Evaluation Committee shall correct the quantification indicated in the Financial Proposal so as to make it consistent with that indicated in the Technical Proposal, apply the relevant unit price included in the Financial Proposal to the corrected quantity and correct the total Proposal cost, (ii) if the Lump-Sum form of contract has been included in the RFP, no corrections are applied to the Financial Proposal in this respect. Prices shall be converted to a single currency using the selling rates of exchange, source and date indicated in the Data Sheet
- d) In case of QCBS, the lowest evaluated Financial Proposal (Fm) will be given the maximum financial score (Sf) of 100 points. The financial scores (Sf) of the other Financial Proposals will be computed as indicated in the Data Sheet. Proposals will be ranked according to their combined technical (St) and financial (Sf) scores using the weights (T = the weight given to the Technical Proposal; P = the weight given to the Financial Proposal; T + P = 1) indicated in the Data Sheet: $S = St \times T\% + Sf \times P\%$. The firm achieving the highest combined technical and financial score will be invited for negotiations.
- e) In the case of Fixed-Budget Selection, the Procuring Entity will select the firm that submitted the highest ranked Technical Proposal within the budget. Proposals that exceed the indicated budget will be rejected.

In the case of the Least-Cost Selection, the Procuring Entity will select the lowest proposal among those that passed the minimum technical score.

In both cases the evaluated proposal price according to para. 5.6 shall be considered, and the selected firm is invited for negotiations.

12.5 Negotiations

Negotiations will be held at the date and address indicated in the Data Sheet. The invited Consultant will, as a pre-requisite for attendance at the negotiations, confirm availability of all Professional staff. Failure in satisfying such requirements may result in the Procuring Entity proceeding to negotiate with the next-ranked Consultant. Representatives conducting negotiations on behalf of the Consultant must have written authority to negotiate and conclude a Contract.

12.6 Technical Negotiations

Negotiations will include a discussion of the Technical Proposal, the proposed technical approach and methodology, work plan, and organization and staffing, and any suggestions made by the Consultant to improve the Terms of Reference. The Procuring Entity and the Consultants will finalize the Terms of Reference, staffing schedule, work schedule, logistics, and reporting. These documents will then be incorporated in the Contract as “Description of Services”. Special attention will be paid to clearly defining the inputs and facilities required from the Procuring Entity to ensure satisfactory implementation of the assignment. The Procuring Entity shall prepare minutes of negotiations which will be signed by the Procuring Entity and the Consultant.

12.7 Financial Negotiations

If applicable, it is the responsibility of the Consultant, before starting financial negotiations, to contact the local tax authorities to determine the local tax amount to be paid by the Consultant under the Contract. The financial negotiations will include a clarification (if any) of the firm’s tax liability in the Procuring Entity’s country, and the manner in which it will be reflected in the Contract; and will reflect the agreed technical modifications in the cost of the services. In the cases of QCBS, Fixed-Budget Selection, and the Least-Cost Selection methods, unless there are exceptional reasons, the financial negotiations will involve neither the remuneration rates for staff nor other proposed unit rates. For other methods, Consultants will provide the Procuring Entity with the information on remuneration rates described in the Appendix attached to Section 4 - Financial Proposal - Standard Forms of this RFP.

12.8 Availability of Professional Staff/Experts

Having selected the Consultant on the basis of, among other things, an evaluation of proposed Professional staff, the Procuring Entity expects to negotiate a Contract on the basis of the Professional staff named in the Proposal. Before contract negotiations, the Procuring Entity will require assurances that the Professional staff will be actually available. The Procuring Entity will not consider substitutions during contract negotiations unless both parties agree that undue delay in the selection process makes such substitution unavoidable or for reasons such as death or medical incapacity. If this is not the case and if it is established that Professional staff were offered in the proposal without confirming their availability, the Consultant may be disqualified. Any proposed substitute shall have equivalent or better qualifications and experience than the original candidate and be submitted by the Consultant within the period of time specified in the letter of invitation to negotiate.

12.9 Conclusion of Negotiations

Negotiations will conclude with a review of the draft Contract. To complete negotiations the Procuring Entity and the Consultant will initial the agreed Contract. If negotiations fail, the Procuring Entity will invite the Consultant whose Proposal received the second highest score to negotiate a Contract.

12.10 Award of Contract

After completing negotiations, the Procuring Entity shall award the Contract to the selected Consultant. The Procuring Entity shall promptly notify all unsuccessful Consultants who have submitted proposals.

The Consultant is expected to commence the assignment on the date and at the location specified in the Data Sheet unless otherwise specified in the contract.

Information relating to evaluation of Proposals and recommendations concerning awards shall not be disclosed to the Consultants who submitted the Proposals or to other persons not officially concerned with the process, until the award of Contract. The undue use by any Consultant of confidential information related to the process may result in the rejection of its Proposal

13.0 CONFIDENTIALITY

13.1 Control of Confidential Information

The GOA and Proposers must maintain effective systems to protect Confidential Information.

Neither may:

- (a) Use Confidential Information for any purpose other than the performance of that person's obligations under the Contract or in the assessment of a Proposal.
- (b) Disclose (and must ensure that its employees or agents do not disclose) Confidential Information to any third party, except in accordance with the procedure set out in this Clause.
- (c) Allow its employees or agents access to Confidential Information without ensuring that those employees or agents are aware of and comply with these systems for the protection of Confidential Information.

Information relating to evaluation of Proposals and recommendations concerning awards shall not be disclosed to the anyone – neither the Consultants who submitted the Proposals nor to other persons not officially concerned with the process - until the award of Contract, at which time relevant information may be disclosed in the manner prescribed by the legislation. The undue use by any Consultant of confidential information related to the process may result in the rejection of its Proposal

The GOA or a Proposer may disclose Confidential Information to a third party only where that entity has obtained the prior written approval of the other party to such disclosure. This approval must not be unreasonably withheld if the other party has procured a confidentiality undertaking in the same terms as this Clause in respect of the information from such third party.

13.2 Information Provided by Proposers

The GOA reserves the right to disclose any or all information provided by Proposers where disclosure is:

- (a) Required or compelled by any law;
- (b) Necessary for the provision of advice by the GOA's legal advisers, accountants or other consultants;
- (c) Necessary for the evaluation of this Proposal.

13.3 Bid Validity

Any Proposal shall be an irrevocable offer by the Proposer to perform the Services on the terms of the draft Contract and shall clearly state that the offer is such an offer and is subject to the terms and conditions set out in these Conditions of Proposing.

The Proposal Data Sheet shall specify how many calendar days after the specified Closing Date that the Consultant's Proposal must remain valid and thus open for GoA's acceptance.

During this period, Consultants shall maintain the availability of Professional staff nominated in the Proposal. The Government of Anguilla will make its best effort to complete negotiations within this period. Should the need arise, however, the Government of Anguilla may request Consultants to extend the validity period of their proposals. Consultants who agree to such extension shall confirm that they maintain the availability of the Professional staff nominated in the Proposal. Should staff availability change, Consultants may submit replacement staff who would then be considered in the final evaluation of their proposals for contract award. Consultants who do not agree have the right to refuse to extend the validity of their Proposals.

SCHEDULE B

PROPOSAL DATA SHEET

PROPOSAL DATA SHEET

Paragraph Reference	
3.2	Procuring Entity: The Ministry of Infrastructure Communications Utilities, Housing and Tourism
4.4	Procurement Name: Consulting Firm to Develop EE/RE Curriculum and Conduct Energy Sector Capacity Building Towards Anguilla's Sustainable Energy Transition
8.0	Method of Selection: <u>Quality Based Selection</u>
3.3	A pre-proposal conference will be held: <i>No</i> For inquiries: <i>Christine Irish, Project Administrator</i> The Ministry of Infrastructure Communications Utilities, Housing and Tourism P.O. Box 60 Coronation Avenue The Valley, Anguilla British West Indies Email: AREP@gov.ai Telephone: (264)-497-2651
3.12	The Ministry of Infrastructure Communications Utilities, Housing and Tourism will provide the following inputs and facilities to the successful consultants: 1. Venue to Conduct Trainings 2. Local Data and Logistical Support (where necessary in the planning of trainings)
11.0	The Procuring Entity envisages the need for continuity for downstream work: No
3.7	Enquiries/clarifications may be requested not later than five business (5) days before the submission date, that is no later than <i>23rd of February, 2024</i> The address for requesting clarifications is: <i>Christine Irish, Project Administrator</i> The Ministry of Infrastructure

	<p>Communications Utilities, Housing and Tourism P.O. Box 60 Coronation Avenue The Valley, Anguilla British West Indies Email: AREP@gov.ai Telephone: (264)-497-2651</p>
4.4	Proposals shall be submitted in English and all prices should be quoted in: Euros (€) and United States Dollars (USD)
4.4	Technical and Financial Bids to be submitted at the same time: Yes
4.4	Proposals must be submitted no later than 23 rd February 2024
4.4	<p>Proposal Submission</p> <ul style="list-style-type: none"> i) The Technical and Financial Proposals must be emailed as two (2) PDF files to AREP@gov.ai ii) The subject matter of the email must read: Consulting Firm to Develop EE/RE Curriculum and Conduct Energy Sector Capacity Building Towards Anguilla's Sustainable Energy Transition iii) Bids may be secured with a password, but it is not mandatory. Whereby a bid is password protected, it must be emailed no later than 5 minutes prior to the deadline for bid submission to the project administrator: AREP@gov.ai. The subject matter for email containing password must read: Consulting Firm to Develop EE/RE Curriculum and Conduct Energy Sector Capacity Building Towards Anguilla's Sustainable Energy Transition
5.0	A proposer may change or modify a Proposal by submitting to the Project Administrator, at any time before the submission deadline, a Notice of Modification which details the changes made. The Notice of Modification shall be submitted via email to the Project Administrator with the subject "Modification to Proposal: Capacity Building RFP."
5.0	A proposer can withdraw a Proposal before the submission date by sending an email notice of withdrawal to the Project Administrator with the subject

	“Withdrawal of Proposal: Capacity Building RFP.” No Proposal shall be withdrawn by the proposer after the proposal due date.		
4.4	Shortlisted Consultants may <u>NOT</u> associate with other shortlisted Consultants:		
3.1	The available budget is: <u>90,000 EURO.</u>		
3.4	Training is a specific component of this assignment: <i>Yes. The Terms of Reference outlines the scope of works for this Capacity Building Initiative.</i>		
13.3	<p>Any Proposal shall be an irrevocable offer by the Proposer to perform the Services on the terms of the draft Contract and shall clearly state that the offer is such an offer and is subject to the terms and conditions set out in these Conditions of Proposing.</p> <p>The Proposal offered by the Proposer will remain open for acceptance by the GOA for a period of <u>90</u> calendar days from the Closing Date; that is, until <i>May 23rd, 2024</i></p>		
12.2	Cate gory	Description	Weighting ((Points))
	1	(i) Five to eight years combined team experience carrying out similar Capacity Building activities relevant to the TOR [20 pts] (i) Demonstrated experience conducting at least three similar assignments in the Caribbean with references [20 pts]	40
	2	(ii) Adequacy of the proposed methodology and work plan in responding to the Terms of Reference: <ul style="list-style-type: none"> • Technical approach and methodology clearly align with the TOR [15pts] • Work plan [10pts] • Clear organization chart outlining of each consultants’ role in this assignment [5pts] 	30
	3	(iii) Key professional staff qualifications and competence for the assignment:	25

		<ul style="list-style-type: none"> • One Lead expert with eight to ten years' experience in Renewable Energy and Energy Efficiency projects with related highlighted experience in the Caribbean. The expert must possess at least a master's degree in Energy engineering, electrical engineering, or related field. [10 pts] • One expert with at least five to eight years' experience in Renewable Energy, with an emphasis on Solar PV installations and experience in carrying out Solar PV capacity building. [5pts] • One expert with at least five to eight years of experience in Energy Auditing and Training. Experts must possess a Commercial Energy Auditor Certification Examination Certification or similar and have at least a bachelor's degree in electrical engineering, energy engineering, renewable energy technology, or another related field. [5 pts] • One expert with at least five to eight years of experience working in the Finance Sector, with highlighted emphasis of experience in Energy Efficiency and Renewable Project Financing. The expert must possess at least a bachelor's degree in finance/Climate Finance, Economics, or a related Field. [5 pts] 	
	4	Overall presentation and clarity of proposal	5
		Total	100
	Expected date for commencement of consulting services:		

	Mid-March 2024 to Mid-May 20234.
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SCHEDULE C

GENERAL CONDITIONS OF CONTRACT

GENERAL CONDITIONS OF CONTRACT:

Lump-Sum Payments

SAMPLE STANDARD CONTRACT FOR CONSULTING SERVICES LUMP-SUM PAYMENTS

CONTRACT

THIS CONTRACT ("Contract") is entered into this *[insert starting date of assignment]*, by and between *[insert Procuring Entity's name]* ("the Procuring Entity") on behalf of the Government of Anguilla, and *[insert Consultant's name]* ("the Consultant") having its principal office located at *[insert Consultant's address]*.

WHEREAS, the Procuring Entity wishes to have the Consultant perform the services hereinafter referred to, and

WHEREAS, the Consultant is willing to perform these services,

NOW THEREFORE THE PARTIES hereby agree as follows:

- 1. Services**
 - (i) The Consultant shall perform the services specified in Annex A, "Terms of Reference and Scope of Services," which is made an integral part of this Contract ("the Services").
 - (ii) The Consultant shall provide the personnel listed in Annex B, "Consultant's Personnel," to perform the Services.
 - (iii) The Consultant shall submit to the Procuring Entity the reports in the form and within the time periods specified in Annex C, "Consultant's Reporting Obligations."
- 2. Term**

The Consultant shall perform the Services during the period commencing *[insert starting date]* and continuing through *[insert completion date]*, or any other period as may be subsequently agreed by the parties in writing.
- 3. Payment**
 - A. Ceiling

For Services rendered pursuant to Annex A, the Procuring Entity shall pay the Consultant an amount not to exceed *[insert amount]*. This amount has been established based on the understanding that it includes all of the Consultant's costs and profits as well as any tax obligation that may be imposed on the Consultant.

B. Schedule of Payments

The schedule of payments is specified below:¹ *[insert amount and currency]* upon the Government of Anguilla's receipt of a copy of this Contract signed by the Consultant;

[insert amount and currency] upon the Government of Anguilla's receipt of the draft report, acceptable to the Anguilla; and

[insert amount and currency] upon the Government of Anguilla's receipt of the final report, acceptable to the Government of Anguilla.

[insert amount and currency] Total

C. Payment Conditions

Payment shall be made in *[specify currency]*, no later than 30 days following submission by the Consultant of invoices in duplicate to the Contract Manager designated in paragraph 4.

4. **Project Administration**

A. Contract Manager.

The Procuring Entity designates Mr./Ms./Mrs. *[insert name and job title]* as Contract Manager; the Contract Manager will be responsible for the coordination of activities under this Contract, for acceptance and approval of the reports and of other deliverables by the Procuring Entity and for receiving and approving invoices for the payment.

B. Reports.

The reports listed in Annex C, "Consultant's Reporting Obligations," shall be submitted in the course of the assignment, and will constitute the basis for the payments to be made under paragraph 3.

5. **Performance Standards**

The Consultant undertakes to perform the Services with the highest standards of professional and ethical competence and integrity. The Consultant shall promptly replace any employees assigned under this Contract that the Government of Anguilla considers unsatisfactory.

6. **Confidentiality**

The Consultants shall not, during the term of this Contract and within two years after its expiration, disclose any proprietary or confidential information relating to the Services, this Contract or the Government of Anguilla's business or operations without the prior written consent of the Government of Anguilla.

7. **Ownership of Material**

Any studies reports or other material, graphic, software or otherwise, prepared by the Consultant for the Government of Anguilla under the Contract shall belong to and remain the property of the Government of Anguilla. The Consultant may retain a copy of such documents and software.²

8. **Consultant Not to be Engaged**

The Consultant agrees that, during the term of this Contract and after its termination, the Consultant and any entity affiliated with the Consultant,

¹ Modify, in order to reflect the output required, as described in Annex C.

² Restrictions about the future use of these documents and software, if any, shall be specified at the end of paragraph 7.

in Certain Activities

shall be disqualified from providing goods, works or services (other than the Services and any continuation thereof) for any project resulting from or closely related to the Services.

9. Insurance

The Consultant will be responsible for taking out any appropriate insurance coverage.

10. Assignment

The Consultant shall not assign this Contract or sub-contract any portion of it without the Government of Anguilla's prior written consent.

11. Law Governing Contract and Language

The Contract shall be governed by the laws of Anguilla and the language of the Contract shall be English.

12. Dispute Resolution

Any dispute arising out of the Contract, which cannot be amicably settled between the parties, shall be referred to adjudication/arbitration in accordance with the laws of the Anguilla.

13. Fraud and Corruption

Government of Anguilla requires that Bidders, Suppliers, Contractors, and Consultants, observe the highest standard of ethics during the procurement and execution of such contracts. In pursuit of this policy, GOA:

- (a) defines, for the purposes of this provision, the terms set forth below as follows:

“corrupt practice” means the offering, giving, receiving, or soliciting, directly or indirectly, of anything of value to influence the action of a public official in the procurement process or in contract execution;

“fraudulent practice” means a misrepresentation or omission of facts in order to influence a procurement process or the execution of a contract, to the detriment of Government of Anguilla and includes collusive practice among bidders (prior to or after bid submission) designed to establish bid prices at artificial non-competitive levels and to deprive Government of the benefits of free and open competition;

“collusive practice” means a scheme or arrangement between two or more bidders, with or without the knowledge of the Government of Anguilla, designed to establish bid prices at artificial non-competitive levels or to influence the action of any party in the procurement process or the execution of a contract; and

“coercive practice” means harming or threatening to harm, directly or indirectly, persons or their property to influence

their participation in the procurement process or affect the execution of a contract;

- (b) will reject a proposal for award if it determines that the Bidder recommended for award has, directly or through an agent, engaged in corrupt, fraudulent, collusive or coercive practices in competing for the Contract in question;
- (c) will sanction a firm or individual, including declaring them ineligible, either indefinitely or for a stated period of time, to be awarded a GOA-financed contract if it at any time determines that they have, directly or through an agent, engaged, in corrupt, fraudulent, collusive or coercive practices in competing for, or in executing, a GOA-financed contract; and
- (d) will have the right to require that a provision be included in Bidding Documents and in contracts financed by a GOA, requiring bidders, suppliers, contractors and consultants to permit GOA to inspect their accounts and records and other documents relating to the Bid submission and contract performance and to have them audited by auditors appointed by the GOA.

3.1 Furthermore, Bidders shall be aware of the provision stated in Sub-Clause 34.1 (a) (iii) of the General Conditions of Contract.

FOR THE PROCURING ENTITY

FOR THE CONSULTANT

Signed by _____

Signed by _____

Title: _____

Title: _____

LIST OF ANNEXES

SECTION 2, SCHEDULE C– GENERAL CONDITIONS OF CONTRACT

Annex A: Terms of Reference and Scope of Services

Annex B: Consultant's Personnel

Annex C: Consultant's Reporting Obligations



Anguilla Renewable Energy Programme (AREP)
Ministry of Infrastructure, Communications, Utilities, Housing & Tourism
Coronation Avenue, The Valley, Anguilla
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micuh@gov.ai



SCHEDULE D

TERMS OF REFERENCE

Terms of Reference:

Consulting Firm to Develop EE/RE Curriculum and Conduct Energy Sector Capacity Building Towards Anguilla's Sustainable Energy Transition

1.0 INTRODUCTION

The Government of Anguilla (GoA) recognizes the vulnerability of Anguilla as a Small Island Developing State and is forging ahead with an inclusive approach to a more sustainable, climate smart and resilient future. One of the pillars for this will be building a climate smart resilient economy, powered with renewable energy, lowered energy costs and reduced carbon emissions.

The Government of Anguilla has received funding from the European Union (EU) and Expertise France (EF) to support its climate change mitigation activities through the international program known as RESEMBID- the Resilience, Sustainable Energy, and Marine Biodiversity Programme. The national project, “*Streamlining Anguilla's Energy Sector Towards a More Sustainable Future*” being supported under RESEMBID will promote clean energy, and decentralized electricity solutions in Anguilla. This includes Solar PV integration studies, an updated National Energy Policy, and the strengthening of the country's clean energy framework to encourage diversification of the islands' energy mix along with energy efficiency. This project will also seek to increase institutional and individual capacity to support clean energy development within Anguilla.

The training component and its respective activities under this project is intended to increase the capacity of project beneficiaries around renewable energy and energy efficiency to

increase the impact and growth of these services in Anguilla. The increased energy transition knowledge will help to stimulate the public and private sector interest in this transition. It is intended that these training sessions will indirectly help Anguillan communities across the island as access to financial products for their renewable energy investments, energy efficiency and EV purchases is developed.

2.0 OBJECTIVES

The main objective of this consultancy will be to build local capacity through the hiring of consultants who will conduct various training initiatives in renewable energy (Solar PV Installation), financial services and project evaluation, renewable energy and energy efficiency financial products, renewable energy insurance products, and energy efficiencies. It is intended that this series of initiatives will leave a lasting impact and new skills will be garnered to increase on-island technical capabilities and financial availability. It is also intended that training materials which are developed under this consultancy will be adopted by the local tertiary institution and government entities for continued capacity building. Furthermore, the trainings will be mindful of and ensure that female participation is captured in a meaningful to empower Anguillan female professionals and students to be a part of the sustainable energy transformation.

3. SCOPE OF WORK

The consulting firm will execute several activities that contribute towards enhancing key energy-sector stakeholder groups to contribute to Anguilla's energy transition goals. The consultant, in their proposal, is to recommend a duration (in days) and mode of delivery (online or in person) for each training whereby not stipulated in the scope of works.

These training activities will cover 5 thematic areas and stakeholders:

3.1 Regulation and Integration of Renewable Energy Workshop

3.1.1 The consultants will outline the role and potential of renewable energy sources as a fundamental element to a sustainable, competitive, and secure power industry as well as the regulatory mechanisms needed to achieve their integration into an electrical system. This workshop will take a comprehensive view of the regulatory framework for renewable energy that professionals within Anguilla's renewable energy sector and regulatory authorities can benefit from knowing.

3.2 Entry-level and Advance Solar Design and Installation – Solar PV Workshop

3.2.1 The consultants will be expected to provide foundational knowledge on design and installation of PV systems. This workshop is expected to cover topics such as the properties of PV cells & performance variations, PV array design parameters, interactive inverter systems, standalone systems, mechanism integration of PV arrays, NEC compliance for PV systems, OSHA, and safety, managing and troubleshooting PV systems, resilience considerations (for hurricanes, high salinity environments, etc), utility interconnection standards and production calculations.

3.3 Introduction to Energy Efficiency and Level 1 & 2 Energy Audit Training (In-Person)

3.3.1 The consultant will deliver a training programme based on or similar to the **Energy Audit Institute Commercial Energy Audit Training Programme** that will teach participants how to conduct a detailed energy audit of a small business. Participants will learn to identify common areas of energy wastage in a commercial facility. It will

also cover more in-depth energy conservation techniques to enable participants to identify maximum energy savings insights and over topics such as facility lighting, water, cooling, insulation, and machinery. Upon completion of the course, participants should be nearer to qualifying and completing the **Commercial Energy Auditor Certification Examination**.

3.4 Development of Micro-Finance Products

- 3.4.1 To unlock renewable energy and energy efficiency investments, the consultants will conduct a training for finance and insurance professionals on the potential sources of finance and risk support for available projects. The training will look at bank markets, and bond insurance, to leasing and other foreign and local currency funding alternatives, highlighting their differences, requirements, and investor concerns.
- 3.4.2 Across different regions, studies on Micro-finance Institutions (MFI's) and Energy Companies have shown the potential market for energy products can be transformed into effective demand if individuals can access appropriately designed loans for the purchase of modern energy services. These energy-lending can represent a wide range of innovative strategies and approaches that offer valuable lessons for other MFIs. Therefore, the consultants will conduct a training on Energy lending with examples and current best-practices and models being utilised in the Latin America and Caribbean, or other similar developing territories to Anguilla. The training will also explore suitable Energy Products that can be offered through the appropriate energy lending model, e.g., solar products, EE retrofitting. The training will look at the potential Role of GOA (and Donors) in addressing the challenges of introducing energy lending with credit enhancement and technical assistance schemes and possible partnerships and regional learning exchanges which can be offered. Also, it

will explore business and financing models for micro-finance products and energy lending through a solid understanding of the Anguillian Market, and assurances to client and training support for growth of products. For example, increasing the understanding of lower income communities on the potential benefits of modern energy. And increasing their access to support for taking on a small loan. The sessions may also consider GOA's fitness for granting/partial subsidies. Finally, it will explore the potential risks, risk appetites, risk mitigation and risk management for micro-financing institutions in energy lending.

3.5 Renewable Energy Financing (Introduction and Advanced)

- 3.5.1 The Consultants will conduct a training that will build the capacity of participants to analyse renewable energy projects for financing and investment opportunities. The program will emphasize intermittent technologies like solar and wind and explain how they differ from conventional power facilities. Attendees will learn to structure project transactions to minimize risks and improve the prospects for strong performance both in existing portfolios and new transactions. This includes a final hands-on modelling session where attendees will construct a model to forecast cashflows of solar facilities, estimate levelized cost of energy and tests for projects and analysing debt capacity and investor returns. In advanced sessions, the sessions should explore the key aspects of project structure, techniques for assembling market information, making qualitative judgements, developing key agreements, and conducting thorough quantitative financial analysis. The course will emphasize many techniques for enhancing the terms of funding provided by official players like export credit agencies, development banks and private and risk insurers.



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The table below indicates the key stakeholders that are expected to participate on these sessions:

	Regulation and Integration of Renewable Energy Workshop	Entry-level and Advance Solar Design and Installation – Solar PV Workshop	Introduction to Energy Efficiency and Level 1 & 2 Energy Audit Training (In-Person)	Development of Micro-Finance Products	Renewable Energy Financing (Introduction and Advanced)	Total
Electric Inspector	2	1	1			
Electrical Inspector Asst	1	1	1			
Dept. Of Natural Resources	1		3			
Department of Infrastructure	2					
Ministry of Infrastructure & Public Utilities Commission	5	3	3	4		
Ministry of Finance and Economic Development					4	
Local Contractors (Mechanics, Builders, Electricians, etc.)	10	12	12	12	15	

ANGLEC and other utilities	4	5				
Community College and Sixth form Technical Students	5	10	12	12	12	
Finance and Insurance Institutions	4					
Ministry of Finance	1	3	3			
Anguilla Building Board				3		
Anguilla Development Board				3	3	
Banking Sector-Loan Officers				8	8	
Insurance Sector-Agents and Officers				8	8	
Total	35	35	35	50	50	

4. DELIVERABLES

4.1 The consultants must submit an Inception Report that includes a detailed work plan for the execution of this assignment which is to take place over a 8-week period. The Inception Report must also reflect any changes and the outcome of discussions following the Inception Meeting with the project team.

4.2 Regulation and Integration of Renewable Energy Workshop

- 4.2.1 The consultants must submit a brief workshop concept document highlighting the objectives and methodology of training. The document will highlight the workshop aids and materials to be utilised. The document will include a draft agenda of session topics and timeframe. The consultant is encouraged to emphasize content, where appropriate, using case-studies and best practices (with preference to the Caribbean Region). The consultant may advise on the topics to be prioritised and/or recommend additional topics that will be beneficial to participants and the effectiveness of the training.
- 4.2.2 Delivery of a **Regulation and Integration of Renewable Energy Workshop** highlighting the objectives under scope of works.
- 4.2.3 The consultants must submit a Workshop Report highlighting the workshop objectives, proceedings, and outcomes. The consultants are expected to obtain participants' feedback through a satisfaction questionnaire or poll and incorporate the findings into the report. The consultants will also expect to track and highlight participants collective understanding of the concepts and topics covered by the end of the workshop. The report should include annexes of presentation slides, any other visual learning material utilised and links to references used develop the content covered.

4.3 Entry-level and Advance Solar Design and Installation – Solar PV Workshop

- 4.3.1 The consultants must submit a brief workshop concept document highlighting the objectives and methodology of training. The document will highlight the workshop aids materials to be utilised. The document will include a draft agenda of session topics and assigned timeframe. The consultant is encouraged to emphasize content, where appropriate, case-studies and best practices (with preference to the Caribbean Region). The consultant may advise on the topics to be prioritised and/or recommend additional topics that will be beneficial to participants and the effectiveness of the training.
- 4.3.2 Delivery of Entry-level and Advance Solar Design and Installation – Solar PV Workshop** highlighting the objectives under scope of works.
- 4.3.3 The consultants must submit a Workshop Report highlighting the workshop objectives, proceedings, and outcomes. The consultants are expected to obtain participants’ feedback through a satisfaction questionnaire or poll and incorporate the findings into the report. The consultants will also track and highlight participants’ collective understanding of the concepts and topics covered by the end of the workshop. The report should include an annex of presentation slides, any other visual learning material utilised and links to references used to develop the content covered.

4.4 Introduction to Energy Efficiency and Level 1 & 2 Energy Audit Training (In-Person)

- 4.4.1 Develop a **Training curriculum adapted from or similar to the** Energy Audit Institute Commercial Energy Audit Training Programme. This document will also highlight key equipment and their uses in the audit process. Among the participants will be teachers and students from the local tertiary institution and technical/vocational institutions. This curriculum will be utilized by the institutions and updated as necessary for continued capacity building beyond the life of the project.

4.4.2 Delivery of an **Introduction to Energy Efficiency and Level 1 & 2 Energy Audit**

Training. Upon successful completion of the training, participants should be nearer to confidently qualifying for the Commercial Energy Auditor Certification Examination.

- 4.4.3 The consultants must submit a Training Outcome Report highlighting the training and outcomes. The consultants are expected to obtain participants' feedback through a satisfaction questionnaire or poll and incorporate the findings into the report. The consultants will also expect to track and highlight participants' collective understanding of the concepts and topics covered by the end of the workshop. The report should include an annex of presentation slides, any other visual learning material utilized and links to references used to develop the content covered. The report should include annexes of presentation slides, any other visual learning material utilized and links to references used develop the content covered.

4.5 Development of Micro-Finance Products Workshop

- 4.5.1 The consultants must submit a brief workshop concept document highlighting the objectives and methodology of training. The document will highlight the workshop aids materials to be utilised. The document will include a draft agenda of session topics and assigned timeframe. The consultant is encouraged to emphasize, where appropriate, case-studies and best practices (with preference to the Caribbean Region). The consultant may advise on the topics to be prioritised and/or recommend additional topics that will be beneficial to participants and the effectiveness of the training.
- 4.5.2 Delivery of a *Development of Micro-Finance Products Workshop* highlighting the objectives under scope of works.
- 4.5.3 Sumit a Workshop Report highlighting the workshop objectives, proceedings, and outcomes. The consultants are expected to obtain participants' feedback through a satisfaction

questionnaire or poll and incorporate the findings into the report. The consultants will also expect to track and highlight participants' collective understanding of the concepts and topics covered by the end of the workshop. The report should include an annex of presentation slides, any other visual learning material utilised and links to references used to develop the content covered. The report should include annexes of presentation slides, any other visual learning material utilised and links to references used to develop the content covered.

4.6 Renewable Energy Financing (Introduction and Advanced)

4.6.1 Brief workshop concept document highlighting the objectives and methodology of training.

The document will highlight the workshop aids materials to be utilised. The document will include a draft agenda of session topics and assigned timeframe. The consultant is encouraged to emphasize, where appropriate, case studies and best practices (with preference to the Caribbean Region). The consultant may advise on the topics to be prioritised and/or recommend additional topics that will be beneficial to participants and the effectiveness of the training.

4.6.2 Delivery of Renewable **Energy Financing (Introduction and Advanced) highlighting the objectives under scope of works.**

The consultants must submit a Training Outcome Report highlighting the training and outcomes. The consultants are expected to obtain participants' feedback through a satisfaction questionnaire or poll and incorporate the findings into the report. The consultants will also expect to track and highlight participants' collective understanding of the concepts and topics covered by the end of the workshop. The report should include an annex of presentation slides, any other visual learning material utilised and links to references used to develop the content covered. The report should include annexes of presentation slides, any other visual learning material utilised and links to references used develop the content covered.

5. REPORTING AND NATURE OF THE ASSIGNMENT

5.1 The Consultants will report to the main project team within the Ministry of Infrastructure, Communications, Utilities, Housing and Tourism for contractual and administrative purposes. The firm will work in close coordination and collaboration with the Project Manager. Members of the project core team will provide additional technical advice, input, and overall oversight for this consultancy.

5.2 Duration of Contract: This assignment is expected to be completed within a 8-week period). The consultant is expected to submit in their technical proposal a recommended workplan and schedule for activities and deliverables outlined in this TOR and may suggest whereby possible activities that can occur in parallel. For example, some blends of online and in-person activities where suitable.

5.3 The Consulting team is expected to work between its own office space/country of usual operation and Anguilla. The consultant will be expected to make themselves available in Anguilla to carry out the agreed to in person training.

5.4 Start date: The intended commencement date is Mid-March 2024.

6. MILESTONES AND PAYMENT SCHEDULE

6.1 Payments will be based on the acceptance of Deliverables (*see table 1 below*).

Deliverables and payment schedules are to be finalized during contract negotiations.

All deliverables are considered final upon written acceptance from the project manager, on behalf of the project team.

6.2 The amount that GOA shall pay the consultant for services rendered will not exceed the final contract price negotiated. This amount includes professional fees, non-

travel related costs, travel-related expenses, tax obligations in their home country and profit.

6.3 The taxes applicable to the price in Anguilla will be borne by the GOA. Given that the current legislation in Anguilla does not apply withholding for this type of payment, the price of the final contract at awarded will be the net amount to be received by the consultant,

Proposed Deliverables Schedule.

#	Indicative Deliverables Schedule <i>(The final payment schedule and percentages will be determined by the indicative workplan in awarded proposal and/or at contract negotiation)</i>	Payment %
1	Inception Report (Inclusive of updated workplan and revised training concepts)	10%
2	Regulation and Integration of Renewable Energy Workshop and Workshop Report	18%
3	Entry-level and Advance Solar Design and Installation – Solar PV Workshop and Workshop Report	18%
4	Introduction to Energy Efficiency and Level 1 & 2 Energy Audit Training and Training Outcome Report and Training Curriculum	18%
5	Development of Micro-Finance Products Workshop and Workshop Report	18%
6	Renewable Energy Financing (Introduction and Advanced) Workshop and Workshop Report	18%

7. QUALIFICATIONS, SKILLS, AND EXPERIENCE

7.1 Qualifications and Experience

Team must possess *at least*:

- One Lead expert with eight to ten years' experience in Renewable Energy and Energy Efficiency projects with related highlighted experience in the Caribbean. The expert must possess at least a master's degree in Energy engineering, electrical engineering or related field.

- One expert with at least five to eight years' experience in Renewable Energy, with an emphasis on Solar PV installations and experience in carrying out Solar PV capacity building.
- One expert with at least five to eight years of experience in Energy Auditing and Training. Experts must possess a Commercial Energy Auditor Certification Examination Certification or similar and have at least a bachelor's degree in electrical engineering, energy engineering, renewable energy technology, or another related field.
- One expert with at least five to eight years of experience working in the Finance Sector, with highlighted emphasis of experience in Energy Efficiency and Renewable Project Financing. The expert must possess at least a bachelor's degree in finance/Climate Finance, Economics, or a related Field.

Other skills:

- Fluency in the English language with excellent verbal and written communication skills
- Extensive knowledge of renewable energy, particularly PV solar and battery energy storage systems.
- Knowledge of relevant legislation and regulation relevant to Anguilla's electricity sector is an asset.
- Experience working with donor-funded projects and government agencies in the Caribbean or similar developing territories.
- Previous experience with implementing similar trainings and capacity building initiatives.

Other experts

CVs for experts other than the key experts highlighted above should be submitted in the proposal. The Consultancy Firm/Team may select and hire other experts as required according to their needs. The selection procedures used by the firm to select these other experts shall be transparent and shall

be based on pre-defined criteria, including professional qualifications, language skills, and work experience. The roles of each expert should be outlined in the submitted proposal.

8. EQUIPMENT

No equipment is to be purchased on behalf of the Contracting Authority/beneficiary country as part of this service contract or transferred to the Contracting Authority/beneficiary country at the end of this contract. The Government of Anguilla is in possession of energy audit equipment that will be at the disposal of the consultants to conduct the training,

9. LANGUAGE

All written documentation and oral communication will be conducted in English.

10. LOGISTICAL SUPPORT

The project team will provide the following inputs and facilities:

- Make accessible all available background documents and information relevant to the assignment.
- Issue the relevant Introductory Letters and facilitate contact with the relevant stakeholders and participants, as necessary.
- Organize conference call meetings with the consultant to address any questions or concerns and to receive updates about progress made on the assignment.
- Provide necessary timely logistical support for the successful completion of the activities detailed in these Terms of Reference.

11. APPLICATION PROCESS AND DEADLINE FOR SUBMISSION

11.1

- iv) The Technical and Financial Proposals must be emailed as two (2) PDF file to *AREP@gov.ai*
- v) The subject matter of the email must read: **Consulting Firm to Develop EE/RE Curriculum and Conduct Energy Sector Capacity Building**

Towards Anguilla's Sustainable Energy Transition

- vi) Bids may be secured with a password, but it is not mandatory. Whereby a bid is password protected, it must be emailed to no later than 5 minutes prior to the deadline for bid submission to the project administrator: AREP@gov.ai. The subject matter for email containing password must read: **Consulting Firm to Develop EE/RE Curriculum and Conduct Energy Sector Capacity Building Towards Anguilla's Sustainable Energy Transition**

11.2 Requests for Clarification:

Email: AREP@gov.ai

Attention: **Ms. Cristene Irish, Project Administrator**

- (i) Requests for clarification should be received no later than 5 business days before the deadline for submission.
- (ii) Consultants are advised that the responses to the requests for clarification will be only posted on the on the Government of Anguilla's Website:

Deadline for submission: on or before 4:00pm (GMT-4), Friday, 23rd February 2024

12. EVALUATION CRITERIA

Proposals must achieve a total of 80 points or more for the proposal to be considered technically sound.

Category	Description	Weighting ((Points)
1	(i) Five to eight years combined team experience carrying out similar Capacity Building activities relevant to the TOR [20 pts] (i) Demonstrated experience conducting at least three similar assignments in the Caribbean with references [20 pts]	40
2	(ii) Adequacy of the proposed methodology and work plan in responding to the Terms of Reference: <ul style="list-style-type: none"> • Technical approach and methodology clearly align with the TOR [15pts] • Work plan [10pts] • Clear organization chart outlining of each consultants' role in this assignment [5pts] 	30
3	(iii) Key professional staff qualifications and competence for the assignment: <ul style="list-style-type: none"> • One Lead expert with eight to ten years' experience in Renewable Energy and Energy Efficiency projects with related highlighted experience in the Caribbean. The expert must possess at least a master's degree in Energy engineering, electrical engineering, or related field. [10 pts] • One expert with at least five to eight years' experience in Renewable Energy, with an emphasis on Solar PV installations and experience in carrying out Solar PV capacity building. [5pts] • One expert with at least five to eight years of experience in Energy Auditing and Training. Experts must possess a Commercial Energy Auditor Certification Examination Certification or similar and have at least a bachelor's degree in electrical engineering, energy engineering, renewable energy technology, or another related field. [5 pts] • One expert with at least five to eight years of experience working in the Finance Sector, with highlighted emphasis of experience in Energy Efficiency and Renewable Project Financing. 	25

	The expert must possess at least a bachelor's degree in finance/Climate Finance, Economics, or a related Field. [5 pts]	
4	Overall presentation and clarity of proposal	5
	Total	100



Anguilla Renewable Energy Programme (AREP)
Ministry of Infrastructure, Communications, Utilities, Housing & Tourism
Coronation Avenue, The Valley, Anguilla
+1 264 497 2651
micuh@gov.ai



SCHEDULE E

PROPOSAL RETURN SCHEDULES

SCHEDULE E

TECHNICAL PROPOSAL RETURN FORMS

TECH 1: TECHNICAL PROPOSAL LETTER OF SUBMISSION

[Date]

Government of Anguilla
P.O. Box 60
The Valley, Anguilla

Dear Sir/Madam,

We, *[insert name of legal entity/entities]*, offer to provide the consulting services for *[Insert title of assignment]* in accordance with your Request for Proposal dated *[Insert Date]* and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal, and a Financial Proposal as separate PDF documents.

We are submitting our Proposal in association with:

[Insert a list with full name and address of each associated Consultant and Indicate the Lead Member]

We hereby declare that all the information and statements made in this Proposal are true and accept that any misinterpretation or misrepresentation or any conflict of interest contained in this Proposal may lead to our disqualification.

In competing for (and if awarded, in executing) the Contract, we undertake to observe the laws against fraud and corruption, including bribery, in force in Anguilla.

We undertake to negotiate a Contract based on the proposed professional staff. Any substitution of professional staff will require additional approval from Government of Anguilla. We accept that any unauthorized substitution of professional staff may lead to the termination of Contract negotiations. Our Proposal is binding upon us and subject to the modifications resulting from Contract negotiations.

We undertake, if our Proposal is accepted, to initiate the consulting services related to the assignment not later than the date indicated in the contract.

We understand that Government of Anguilla are not bound to accept any Proposal you receive.

Yours sincerely,

Authorized Signature¹ *[In full and initials]*: _____

Name and Title of Signatory: _____

Name of Firm (Company's Name or Consortiums Name): _____

Address: _____

Contact information (phone and e-mail): _____

¹ For a Consortium, either all members shall sign or only the lead member, in which case the power of attorney to sign on behalf of all members shall be attached.

TECH 2: PROPOSAL FORM – FORMAL OFFER

CONTRACT NO. 07-2023	PROJECT:
Proposer..... (full trading name)	
TAX Registration #:	
Registered Office Address:	
Business Address:	
Telephone:	
Fax:	
Email:	
If Consortium, please complete the form below:	

	Name(s) and address(es) of legal entity or entities submitting this tender
Leader²	
Member	
Etc. ...	

The Proposer named above, hereby offers to provide Services in accordance with:

- (a) **Schedule A -Instruction for Proposers;**
- (b) **Schedule B –Bid Data Sheet;**
- (c) **Schedule C -Conditions of Contract;**
- (d) **Schedule D –Terms of Reference;**
- (e) **Schedule E -Proposal Return Schedules;**
- (f) **Any Addenda to the above;**
- (g) **This Proposal including all its schedules relating to the above Contract.**

The Proposer warrants and represents that:

- (a) It has fully acquainted itself with all of the documents referred to in the Proposal and all matters relating thereto;
- (b) Agrees to be bound by the Conditions of Contract.
- (c) All the information provided in its Proposal is true and correct.

² Add/delete additional lines for consortium members as appropriate. **Note that subcontractors are not considered to be consortium members.** If this tender is being submitted by an individual legal entity, the name of that legal entity should be entered as ‘**Leader**’ (and all other lines should be deleted). Any change in the identity of the Leader and/or any consortium members between the deadline for receipt of tenders set in the Instructions to tenderers and the award of the contract is not permitted without the prior approval in writing of the Contracting Authority.

- (d) It has made its own enquiries and investigations and has obtained professional advice and all other relevant information so as to inform itself of all risks and contingencies which may affect its Proposal price.
- (e) It has allowed for all such risks and contingencies in its proposal price.

TECH 2-C: Contact Person for this Proposal:

Name	
Organization	
Address	
Telephone	
Fax	
e-mail	

TECH 3 – CONSULTANT'S ORGANIZATION AND EXPERIENCE

A - Consultant's Organization

[Provide here a brief (two pages) description of the background and organization of your firm/entity and each associate for this assignment.]

B - Consultant's Experience

[Using the format below, provide information on each assignment for which your firm, and each associate for this assignment, was legally contracted either individually as a corporate entity or as one of the major companies within an association, for carrying out consulting services similar to the ones requested under this assignment. Use 20 pages.]

Assignment name:	Approx. value of the contract (in current US\$ or Euro):
Country: Location within country:	Duration of assignment (months):
Name of Centre:	Total N° of staff-months of the assignment:
Address:	Approx. value of the services provided by your firm under the contract (in current US\$ or £):
Start date (month/year): Completion date (month/year):	N° of professional staff-months provided by associated Consultants:
Name of associated Consultants, if any:	Name of senior professional staff of your firm involved and functions performed (indicate most significant profiles such as Project Director/Coordinator, Team Leader):
Narrative description of Project:	
Description of actual services provided by your staff within the assignment:	

Firm's Name: _____

TECH 4 – COMMENTS AND SUGGESTIONS ON THE TERMS OF REFERENCE AND ON THE COUNTERPART STAFF AND FACILITIES TO BE PROVIDED BY THE MINISTRY

A - On the Terms of Reference

[Present and justify here any modifications or improvement to the Terms of Reference you are proposing to improve performance in carrying out the assignment (such as deleting some activity you consider unnecessary, or adding another, or proposing a different phasing of the activities). Such suggestions should be concise and to the point and incorporated in your Proposal.]

TECH 5 - TEAM COMPOSITION, TASK ASSIGNMENTS AND SUMMARY OF CV INFORMATION

Name of Professional Staff	Position Assigned	Years of experience	Task Assigned	Education & Specialist areas of knowledge	Firm

Signature

(person(s) authorised to sign on behalf of the proposer)

Date.....

TECH 6- CURRICULUM VITAE (CV)

1. **Proposed Position** *[only one candidate shall be nominated for each position]:*

2. **Name of Firm** *[Insert name of firm proposing the staff]:*

3. **Name of Staff** *[Insert full name]:*

4. **Date of Birth:** _____ **Nationality:**

5. **Education** *[Indicate college/university and other specialized education of staff member, giving names of institutions, degrees obtained, and dates of obtainment]:*

Institution (Date from - Date to)	Degree(s) or Diploma(s) obtained:

6. **Membership of Professional Associations:**

7. **Other Training** *[Indicate significant training since degrees under 5 - Education were obtained]:*

8. **Countries of Work Experience:** *[List countries where staff has worked in the last ten years]:*

9. **Language Skills:**

Indicate competence on a scale of 1 to 5 (1 - excellent; 5 - basic)

Language	Reading	Speaking	Writing

Curriculum vitae

10. Other skills: (*e.g. programming, etc.*)_____

Curriculum vitae

11. Employment Record *[Starting with present position, list in reverse order every employment held by staff member since graduation, giving for each employment (see format here below): dates of employment, name of employing organization, positions held.]*

Company & reference person ³ (name & contact details)	Location	From [Year]: To [Year]	Position Held	Brief Description of Duties/Project

Other relevant information (e.g., Publications, Seminars, references)

<p>11. Detailed Tasks Assigned</p> <p><i>[List all tasks to be performed under this assignment]</i></p>	<p>12. Work Undertaken that Best Illustrates Capability to Handle the Tasks Assigned</p> <p><i>[Among the assignments in which the staff has been involved, indicate the following information for those assignments that best illustrate staff capability to handle the tasks listed under point 11.]</i></p> <p>Name of assignment or project: _____</p> <p>Year: _____</p> <p>Location: _____</p> <p>Procuring Entity: _____</p> <p>Main project features: _____</p> <p>Positions held: _____</p> <p>Activities performed: _____</p>
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13. Certification:

I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes me, my qualifications, and my experience. I understand that any wilful misstatement may lead to my disqualification or dismissal, if engaged.

³ The Contracting Authority reserves the right to contact the reference persons. If you cannot provide a reference, please provide a justification.

Curriculum vitae

Name Signature
(*person(s) authorised to sign on behalf of the tenderer*)

Date

TECH 7 – METHODOLOGY, APPROACH AND WORK PLAN

[attach sheets as necessary]

4a) The proposed **Management Structure** to execute this project including an organizational chart. You should list the main disciplines of the assignment, the key expert responsible and the proposed technical and support staff.

4b) **Technical Approach and Methodology** Without repeating or copying the TOR, explain your understanding of the objectives of the assignment as outlined in the TOR, the technical approach to the services and methodology you would adopt for implementing the tasks of the assignment to deliver the expected outputs/outcomes.

Entail any risks, assumptions, considerations for the environment, Health and Safety issues, Environmental hazards and Sustainable solutions and explain the technical approach you would adopt to address these. Explain the methodologies you propose to adopt and highlight the compatibility of those methodologies with the proposed approach.

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4c) **Work Plan** Outline the implementation plan for the main activities of the assignment, their content and duration, phasing and interrelations, milestones (including interim GoA approvals) and report delivery dates. A list of the final documents to be delivered – including reports, drawings, and tables – should be included here. The proposed work plan should be consistent with the technical approach and methodology and translate them into a feasible working plan and work schedule showing the assigned tasks for each Expert. This work plan should be consistent with the Work Schedule (see Tech 8) and the Staff Schedule (see Tech 9).

TECH 8 - WORK SCHEDULE

N o	Deliverables 1 (D-..)	Weeks											
		1	2	3	4	5	6	7	8	9	n	TOTAL
D-1	<i>{e.g. Deliverable #1: Report A</i>												
	<i>1) data collection</i>												
	<i>2) drafting</i>												
	<i>3) inception report</i>												
	<i>4) incorporating comments</i>												
	<i>5)</i>												
	<i>6) delivery of final report to Client}</i>												
D-2	<i>{e.g. Deliverable #2:.....}</i>												
D-3													

1. List the deliverables with the breakdown for main activities required to produce them and other benchmarks such as the Client's approvals. For phased assignments indicate the activities, delivery of reports (inception, interim, final), and benchmarks separately for each phase.
2. Duration of activities shall be indicated in form of a bar chart.
3. Include a legend, if necessary, to help reading the chart

TECH 9 - STAFF SCHEDULE

No	Name	Staff's Input (in person-week/person-days) per each Deliverable (listed in TECH)										Office	Field	Total	
		Position		D-1	D-2	D-3	D-...	D-...	D-...						
1	{E.g Mr. Abbbb} ⁴	{Team Leader}	[Office]	2.0 mth	1.0	1.0							4		7
			[Field]	0.5 mth	2.5	0									
2			[Office]												
			[Field]												
3			[Office]												
			[Field]												
4			[Office]												
			[Field]												
5			[Office]												
			[Field]												
										Subtotal					7
Support Staff															
			[Office]												
			[Field]												
			[Office]												
			[Field]												
			[Office]												
			[Field]												
			[Office]												
			[Field]												
										Subtotal					
										Total					

⁴ The example (blue ink) should be deleted when completing this form

Government of Anguilla

SCHEDULE E

FINANCIAL PROPOSAL RETURN FORMS

This Schedule shall be read in conjunction with all other parts of the Proposal Document. Proposers are required to complete the following Proposal Price Schedule which should be read in conjunction with the information below and ALL other Sections of the Contract.

FIN 1: PROPOSAL PRICES

- 1. We, *[insert proposer name]*, propose to provide *[insert the services]* more specifically described elsewhere in the Proposal Document for the CONTRACT Price calculated in accordance with the Terms of Reference and our Technical Proposal.
- 2. We confirm that this Proposal will be held firm and free of any adjustments whatsoever, subject to any modifications resulting from Contract negotiations, and open for acceptance for a period of *[insert proposal validity period]* days from the Closing Date of Proposals.
- 3. Our Financial Proposal is based upon and incorporates all those contract terms referred to in the Proposal Documents.
- 4. The sum proposed calculated on the basis of the Terms of Reference contained under cover of these Proposal Documents is *[insert amount in words]* (EURO*[insert amount in figures]*)⁵.
- 5. Our Summary of Cost, breakdown of Remunerations, staff costs in relations to proposal cost and Reimbursable expenses are included.
- 6. We understand that you are not bound to accept any Proposal you receive.

Signature:
Dated:
Name:
Position Held:

Duly authorized to sign Tenders for and on behalf of:-
[insert Proposer's Name and Registered Address in the space provided below]

.....
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*****(For a Joint Venture/Consortium, either all members shall sign or only the lead member, in which case the power of attorney to sign on behalf of all members shall be attached)***

⁵ Amounts must coincide with the ones indicated under Total Cost of Financial proposal Form in FIN-2

FIN 2: SUMMARY OF COSTS

ITEM	Currency	
	USD (<i>if applicable</i>)	EURO
Total Cost of Financial Proposal ⁶		

⁶ Indicate the total costs to be paid in each currency by GoA. These total costs must align with the sum of the relevant subtotals indicated in all FIN Forms submitted with the Proposal.

FIN 3: BREAKDOWN OF COSTS BY DELIVERABLE⁷

Group of Activities:⁸ 	Description:⁹ 	
Cost component	Costs¹⁰	
	<i>[US Currency]</i>	<i>[EURO]</i>
Remuneration ¹¹		
Expenses ¹²		
Subtotals		

⁷ Form FIN 3 shall be filled at least for the whole assignment. The Consultant shall fill a separate Form FIN-3 for each group of activities. Subtotals of all Forms FIN-3 provided must coincide with the Total Costs of Financial Proposal indicated in Form FIN-2.

⁸ Names should be the same as, or correspond to the ones indicated in the second column of Form TECH-8.

⁹ Short description of the Deliverable whose cost breakdown is provided in this Form.

¹⁰ Indicate between brackets the name of the foreign currency. Use the same columns and currencies of Form FIN-2.

¹¹ For each currency, Remuneration and Expenses must respectively coincide with relevant Total Costs indicated in Forms FIN-4, and FIN-5

¹² For each currency, Remuneration and Expenses must respectively coincide with relevant Total Costs indicated in Forms FIN-4, and FIN-5

FIN 4: REMUNERATION COSTS

(This Form shall only be used when the Lump-Sum Contract is used in the RFP. The information required within this form shall be used only to establish payments to the Consultant for possible additional services requested by GoA.)

No.	Name	Position (as in TECH-6)	Person-days Remunerati on Rate ¹³
	Professional Staff		
1			[Office] ----- [Site]
2			----- -----
n			----- -----
	Support Staff		
1			[Office] ----- [Site]
2			----- -----
n			----- -----

¹³ One working (billable) day shall be not less than eight (8) working (billable) hours.

FIN 5: BREAKDOWN OF REIMBURSABLE EXPENSES

(This Form shall only be used when the Lump-Sum Contract is used in the RFP. The information required within this form shall be used only to establish payments to the Consultant for possible additional services requested by GoA.)

N°	Description ²	Unit	Unit Cost ³	Quantity	[US Currency] ⁴	[EURO] ⁴
	Per diem allowances	Day				
	International flights ⁵	Trip				
	Other transportation (taxi, water taxi etc)	Trip				
	Communication costs between [Insert place] and [Insert place]					
	Drafting, reproduction of reports					
	Equipment, instruments, materials, supplies, etc.					
Total Costs						

1 Form FIN-5 should be filled for each of the Forms FIN-3 provided, if needed.

2 Delete items that are not applicable or add other items

3 Indicate unit cost and currency.

4 Indicate between brackets the name of the foreign currency. Use the same columns and currencies of Form FIN-2. Cost = Unit Cost x Quantity.

5 Indicate route of each flight, and if the trip is one- or two-ways.

Sample Form

Consulting Firm:

Country:

Assignment:

Date:

“Consulting Firm to Develop EE/RE Curriculum and Conduct Energy Sector Capacity Building Towards Anguilla’s Sustainable Energy Transition”

Consultant’s Representations Regarding Costs and Charges

We hereby confirm that:

- (a) the basic salaries indicated in the attached table are taken from the firm’s payroll records and reflect the current salaries of the staff members listed which have not been raised other than within the normal annual salary increase policy as applied to all the firm’s staff;
- (b) attached are true copies of the latest salary slips of the staff members listed;
- (c) the away from headquarters allowances indicated below are those that the Consultants have agreed to pay for this assignment to the staff members listed;
- (d) the factors listed in the attached table for social charges and overhead are based on the firm’s average cost experiences for the latest three years as represented by the firm’s financial statements; and
- (e) said factors for overhead and social charges do not include any bonuses or other means of profit-sharing.

[Name of Consulting Firm]

Signature of Authorized Representative

Date

Name: _____

Title: _____

Consultant's Representations Regarding Costs and Charges

(Expressed in EURO or USD)

Personnel		1	2	3	4	5	6	7	8
Name	Position	Basic Salary per Working Month/Day/Year	Social Charges ¹	Overhead ¹	Subtotal	Fee ²	Away from Headquarters Allowance	Proposed Fixed Rate per Working Month/Day/Hour	Proposed Fixed Rate per Working Month/Day/Hour ¹
Home Office									
Field									

1. Expressed as percentage of 1
2. Expressed as percentage of 4