



Request for Quote/Proposal (RFQ/RFP)

Amendment #1

Commodity/Service Required:	Consultant Power Systems Engineer for Fair Trading Commission (FTC), Barbados.
Type of Procurement:	Consultant Agreement
Type of Contract:	Fixed Price
Term of Contract:	1 year
Contract Funding:	USAID
This Procurement supports:	Energy Sector Reform (ESR) project
Submit Proposal to:	Vianelis Tavarez, Office Coordinator Email: vtavarez@rti.org Copy: ESR Project Management Unit Email: ESR_Procurement@rti.org
Date of Issue of RFP:	18 July 2024
Date Questions from Supplier Due:	25 July 2024- RTI will respond no later than July 30th
Date Proposal Due:	02 August 2024
Approximate Date Purchase Order Issued to Successful Bidder(s):	16 August 2024

Method of Submittal:	
Email to: vtavarez@rti.org Copy to: ESR_Procurement@rti.org	
Respond via e-mail with attached document in MS Word / pdf format. The Bidder/Seller agrees to hold the prices in its offer firm for 90 days from the date specified for the receipt of offers, unless another time is specified in the addendum of the RFP/RFQ.	
Solicitation Number:	PR-DR-2024-016

Attachments to RFP:

1. Attachment "A" – Commodity Specifications
2. Attachment "B" – Instructions to Bidders/Sellers
3. All PO Terms and Conditions are listed on our website at:
https://www.rti.org/sites/default/files/documents/2024-03/rti-po-terms_English%20Version%20-%20v1.20.pdf, http://www.rti.org/files/PO_FAR_Clauses.pdf or for commercial items:
http://www.rti.org/files/PO_FAR_Clauses_Commercial_Items.pdf (hereinafter the "Terms").
Supplier's delivery of products, performance of services, or issuance of invoices in connection

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3040 Cornwallis Road ■ PO Box 12194 ■ Research Triangle Park, NC 27709-2194 ■ USA
Telephone 919.541.6000 ■ Fax 919.541.5985 ■ www.rti.org

with this purchase order establishes Supplier's agreement to the Terms. The Terms may only be modified in writing signed by both parties.

All bidders/sellers are responsible to carefully review each attachment and follow any instructions that may be relevant to this procurement.

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Attachment A

Commodity Specifications or Statement of Work

Statement of Work

Indicate a description of the activity/service that is expected from the supplier. Provide product specifications or service expectations (both if applicable). Include deliverables, timelines, and any special terms and conditions.

Description of Activity/Service:

BACKGROUND FTC

The Barbados Fair Trading Commission (FTC) was established on January 02, 2001 “to safeguard the interests of consumers, to regulate utility services supplied by service providers, to monitor and investigate the conduct of service providers and business enterprises, to promote and maintain effective competition in the economy and for related matters.” The FTC’s goals are to ensure the efficient and safe provision of regulated utility services at reasonable rates; safeguard the interest of consumers; promote and encourage fair competition; and strengthen the human resource and operational capabilities of the Commission in order to effectively implement its legislative mandate.

Barbados has a policy target of 100% renewable energy by 2030. Achieving this target involves a complex array of challenges and opportunities. The nation has made commendable strides in establishing a conducive policy framework and ambitious national objectives for renewable energy integration. However, concerns over grid stability, especially with the increasing installed capacity of solar photovoltaic installations, highlight the need for strategic interventions. The capacity of variable renewable electricity on the grid in Barbados is currently at 89MW, which is significantly close to the estimated maximum capacity (100MW). Consequently, urgent measures are required to ensure more renewables can be connected to the grid, and including greater deployment of grid-connected battery storage.

ESR PROPOSED SUPPORT

The FTC plays a pivotal role in establishing regulation, setting price structures, and reviewing the technical requests for new technology in renewables. The FTC need enhanced capacity to perform its technical role, including an enhanced staff compliment, better training in emergent technical issues, and the establishment of new standard procedures and methodologies.. As such, the FTC has requested the services of a consultant Power Systems Engineer, who can increase their capacity to execute technical tasks. The Power Systems Engineer will work closely along with the staff of the FTC over the period of one year to execute the deliverables mentioned in the next section.

Product or Service Expectations (both if applicable):

Draft Scope of Work

The period of performance is twelve (12) months, from August 2024 to July 2025. The tasks and deliverables are shown in Table 1 below:

Table 1: Tasks Assigned & Expected Deliverables

No.	Task	Expected Deliverable
1.0	Generation Analysis	
1.1	Analyze the performance, efficiency and environmental impacts of conventional and alternative electricity generation methods.	Report on performance, efficiency, and environmental impacts of generation assets, with recommendations for implementation.
1.2	Provide recommendations for optimizing generation resources and reducing environmental impacts.	Training session on optimizing performance and efficiency of generation resources
1.3	Assess the operational and economic impact of the public utility implementing BESS technologies compared to relevant practical alternatives.	Assessment of the operational and economic impact of the public utility implementing BESS technologies. Document outlining the methodology for evaluating BESS projects.
1.4	Assist in the monitoring of power system projects development related to generation efficiency improvement to facilitate renewable projects integration and distributed generation projects.	Methodology document on evaluation of power generation projects. Evaluation of up to five (5) key projects specified by the FTC for the period.
1.5	Carry out investigations and analyses into major system outages on the electric system as necessary. Assess recommendations and provide feedback in order for licensees to develop action plans to mitigate future occurrences.	Report reviewing outages occurring over twelve (12) months, with recommended actions and guidelines to improve reliability.
2.0	Rate Setting	
2.1	Analyze the incorporation of technical efficiency mechanisms for rate structures and pricing models used by regulated utilities.	Report on the analysis of incorporating technical efficiency mechanisms for rate structures.

2.2	Develop and recommend approaches to incorporating technical efficiency in rate structures to align with regulatory objectives, market conditions, and consumer interests.	Report on the recommended approaches to incorporating technical efficiency in rate structures for the local context.
2.3	Assist in the review of project proposals from regulated entities for major repairs and upgrade to existing systems to ensure the proposals are compatible with the statutory and other license requirements and assess the most prudent solution for the licensee and consumers.	Reviews of up to five (5) specific project proposals.
2.4	Develop policies and procedures for the regulation of the utility sectors and systems to monitor compliance.	Guidelines document for performance monitoring of electricity sector licensees.
3.0	Data Analysis	
3.1	Collect and analyze data on electricity generation, consumption and pricing trends.	Report on the support provided and any useful outcomes from this support.
3.2	Develop models and forecasts to inform regulatory decision-making including the establishment of Performance Incentive Metrics.	
3.3	Prepare reports and presentations based on data analysis.	
4.0	General Support and Capacity Building	
4.1	Provide technical expertise and guidance to the regulatory team on power systems, grid stability, and utility technology advancements.	Quarterly report on ongoing support throughout the period for items 4.1 through 4.4.
4.2	Collaborate with stakeholders, utilities, and industry experts to understand emerging technologies.	
4.3	Serves as a key in-house technical advisor to the Office; giving advice and being involved in important problem-solving discussions and activities.	
4.4	Provide advice and conduct such research and analysis as requested by the Commissioners and Management of the FTC on technical and regulatory matters.	
4.5	Contribute to the learning process within the FTC particularly as it relates to the use of Generation Planning tools and generally for all aspects of Power Systems and engineering planning.	An in-house workshop to assess FTC software needs. Needs assessment report on relevant software applications and

4.6	Enquire into and document the power systems engineering strategies that may be pursued to integrate economic activities in other sectors, with the goals of the electricity sector to facilitate economic growth.	Guidelines document on systems engineering strategies to integrate economic activities in other sectors, with the goals of the electricity sector to facilitate economic growth.
5.0 Stakeholder Engagement		
5.1	Engage with stakeholders, including utility companies, consumer advocacy groups, and industry associations, to gather input and feedback on regulatory matters.	Quarterly report on stakeholder engagement activities.
5.2	Participate in meetings as requested with key stakeholders in the utility sector and other entities as may be requested.	
6 IRRP Engagement		
6.1	Liase with the Ministry of Energy (MOE) on Integrated Resource and Resilience Planning (IRRP) Modelling and input parameters validation.	Quarterly report on IRRP support provided.
6.2	Review of IRRP study reports to assess the costs and risks associated with various resource options including their technology, sizing, siting, timing, fuel choices and operation parameters and advise the FTC of the findings.	A report reviewing the modelling and input parameters and validation findings related to the IRRP.
6.3	Represent the FTC in-update activities with MOE on the IRRP to reflect changes in key assumptions and inputs and to keep the FTC abreast of changes as appropriate.	Quarterly report on support activities throughout the period.

Each document and all training sessions produced from this period will become a part of a guidance document for the FTC’s inhouse Power Systems Engineer to be recruited. This document will be used as a guideline of Standard Operating Procedure for the regulators’ capacity in the energy sector.

Deliverables, Timelines, Special Terms and Conditions:

Anticipated Deliverables

Tasks under the work order will produce the following deliverables shown in Table 2:

Table 2: Anticipated Training Deliverables

No.	Expected Deliverable	Estimated Timeline for Completion
1.0	Generation Analysis	
1.1	Report on performance, efficiency, and environmental impacts of generation assets, with recommendations for implementation.	Q2
1.2	Training session on optimizing performance and efficiency of generation resources	
1.3	Assessment of the operational and economic impact of the public utility implementing BESS technologies. Document outlining the methodology for evaluating BESS projects.	Q1 – Evaluation and methodology for proposed BESS penetration
1.4	Methodology document on evaluation of power generation projects. Evaluation of up to five (5) key projects specified by the FTC for the period.	Q1 - methodology; Q2 - evaluation of key projects.
1.5	Report reviewing outages occurring over twelve (12) months, with recommended actions and guidelines to improve reliability.	Q3
2.0	Rate Setting	
2.1	Report on the technical efficiency of rate structures for utilities for small island states with varied circumstances.	Q3
2.2	Report on the varied approaches to incorporating technical efficiency in rate structures to align with regulatory objectives, market conditions, and consumer interests.	
2.3	Reviews of up to five (5) specific project proposals.	Q2
2.4	Guidelines document for performance monitoring of electricity sector licensees.	Q3
3.0	Data Analysis	
3.1	Report on the support provided and any useful outcomes from this support. This report will be added to the guidance document as a Standard Operating Procedure.	Q4
3.2		Q4
3.3		Q4
4.0	General Support and Capacity Building	
4.1	Quarterly report on ongoing support throughout the period for items 4.1 through 4.4.	Each quarter
4.2		
4.3		
4.4		

4.5	Needs assessment report on relevant software applications and conduct an in-house workshop which would assess FTC software needs.	End of Q3
4.6	Guidelines document on systems engineering strategies to integrate economic activities in other sectors, with the goals of the electricity sector to facilitate economic growth.	Q4
5.0	Stakeholder Engagement	
5.1	Quarterly report on stakeholder engagement activities.	Each quarter
5.2		
6	IRRP Engagement	
6.1	Report submitted quarterly on meetings held with the MOE for support. Ongoing assistance with the implementation of the FTC Reserve Capacity and Resiliency Regulation.	Q1
6.2	A report with modelling and input parameters validation findings related to the IRRP.	
6.3	Quarterly report on support activities throughout the period.	Each quarter

Pricing

Item #	Quantity to be Purchased	Description of Preferred Commodity or Services Specifications	Unit of Measure	Unit Fixed Price (Each)	Total Fixed Price (Each)	Lead Time Availability (Number of Days)
1		1.1 Report on performance, efficiency, and environmental impacts of generation assets, with recommendations for implementation.	Deliverable/ activity completed	XX%	XX% of total cost per deliverable/activity	# days
2		1.2 Training session on optimizing performance and efficiency of generation resources	Deliverable/ activity completed	XX%	XX% of total cost per deliverable/activity	# days

3		1.3 Assessment of the operational and economic impact of the public utility implementing BESS technologies. Document outlining the methodology for evaluating BESS projects.	Deliverable/ activity completed	XX%	XX% of total cost per deliverable/activity	# days
4		1.4 Methodology document on evaluation of power generation projects. Evaluation of up to five (5) key projects specified by the FTC for the period.	Deliverable/ activity completed	XX%	XX% of total cost per deliverable/activity	# days
5		1.5 Report reviewing outages occurring over twelve (12) months, with recommended actions and guidelines to improve reliability.	Deliverable/ activity completed	XX%	XX% of total cost per deliverable/activity	# days
6		2.1 Report on the technical efficiency of rate structures for utilities for small island states with varied circumstances.	Deliverable/ activity completed	XX%	XX% of total cost per deliverable/activity	# days
7		2.2 Report on the varied approaches to incorporating technical efficiency in rate structures to align with regulatory objectives, market conditions, and consumer interests.	Deliverable/ activity completed	XX%	XX% of total cost per deliverable/activity	# days
8		2.3 Reviews of up to five (5) specific project proposals.	Deliverable/ activity completed	XX%	XX% of total cost per deliverable/activity	# days

9		2.4 Guidelines document for performance monitoring of electricity sector licensees.	Deliverable/ activity completed	XX%	XX% of total cost per deliverable/activity	# days
10		3.1, 3.2, 3.3 Report on the support provided and any useful outcomes from this support. This report will be added to the guidance document as a Standard Operating Procedure.	Deliverable/ activity completed	XX%	XX% of total cost per deliverable/activity	# days
11		Quarterly report on ongoing support throughout the period for items 4.1 through 4.4.	Deliverable/ activity completed	XX%	XX% of total cost per deliverable/activity	# days
12		Needs assessment report on relevant software applications and conduct an in-house workshop which would assess FTC software needs.	Deliverable/ activity completed	XX%	XX% of total cost per deliverable/activity	# days
13		Guidelines document on systems engineering strategies to integrate economic activities in other sectors, with the goals of the electricity sector to facilitate economic growth.	Deliverable/ activity completed	XX%	XX% of total cost per deliverable/activity	# days
14		Quarterly report on stakeholder engagement activities.	Deliverable/ activity completed	XX%	XX% of total cost per deliverable/activity	# days

15		Report submitted quarterly on meetings held with the MOE for support. Ongoing assistance with the implementation of the FTC Reserve Capacity and Resiliency Regulation.	Deliverable/ activity completed	XX%	XX% of total cost per deliverable/activity	# days
16		A report with modelling and input parameters validation findings related to the IRRP.	Deliverable/ activity completed	XX%	XX% of total cost per deliverable/activity	# days
17		Quarterly report on support activities throughout the period.	Deliverable/ activity completed	XX%	XX% of total cost per deliverable/activity	# days
Total Value						

By signing this attachment, the bidder confirms he has a complete understanding of the specifications and fully intends to deliver items that comply with the above listed specifications.

Signature:

Title:

Date:

Attachment “B” Instructions to Bidders/Sellers

1. **Procurement Narrative Description:** The Buyer (RTI) intends to purchase commodities and/or services identified in Attachment A. The Buyer intends to purchase the quantities (for commodities) and/or services (based on deliverables identified in a Statement of Work). The term of the Ordering Agreement shall be from Award Date to the Delivery date of the Offeror unless extended by mutual agreement of the parties. The Buyer intends to award to a single “approved” supplier based on conformance to the listed specifications, the ability to service this contract, and selling price. We reserve the right to award to more than one bidder. If an Ordering Agreement is established as a result of this RFQ/RFP, supplier understands that quantities indicated in the specifications (Attachment A) are an estimate only and RTI does not guarantee the purchase quantity of any item listed.
2. **Procuring Activity:** This procurement will be made by **Research Triangle Institute (RTI International)**, located at

Dominican Republic Office | RTI International
Calle Juan Garcia Bonelly No. 19, Edificio DML
Santo Domingo, Dominican Republic

(insert full address of the office)

who has a purchase requirement in support of a project funded by

USAID

(insert client’s name)

RTI shall award the initial quantities and/or services and any option quantities (if exercised by RTI) to Seller by a properly executed Purchase Order as set forth within the terms of this properly executed agreement.

3. **Proposal Requirements.** All Sellers will submit a quote/proposal which contains offers for all items and options included in this RFQ/RFP. All information presented in the Sellers quote/proposal will be considered during RTI’s evaluation. Failure to submit the information required in this RFQ/RFP may result in Seller’s offer being deemed non-responsive. Sellers are responsible for submitting offers, and any modifications, revisions, or withdrawals, so as to reach RTI’s office designated in the RFQ/RFP by the time and date specified in the RFQ/RFP. Any offer, modification, revision, or withdrawal of an offer received at the RTI office designated in the RFQ/RFP after the exact time specified for receipt of offers is “late” and may not be considered at the discretion of the RTI Procurement Officer. The Seller’s proposal shall include the following:
 - (a) The solicitation number:
 - (b) The date and time submitted:
 - (c) The name, address, and telephone number of the seller (bidder) and authorized signature of same:
 - (d) Validity period of Quote:

- (e) A technical description of the items being offered in sufficient detail to evaluate compliance with the requirements in the solicitation. This may include product literature, or other documents, if necessary.
 - (f) If RTI informs Seller that the Commodity is intended for export and the Commodity is not classified for export under Export Classification Control Number (ECCN) “EAR99” of the U.S. Department of Commerce Export Administration Regulations (EAR), then Seller must provide RTI the correct ECCN and the name of Seller’s representative responsible for Trade Compliance who can confirm the export classification.
 - (g) Lead Time Availability of the Commodity/Service.
 - (h) Terms of warranty describing what and how the warranties will be serviced.
 - (i) Special pricing instructions: Price and any discount terms or special requirements or terms (special note: pricing must include guaranteed firm fixed prices for items requested.
 - (j) Payment address or instructions (if different from mailing address)
 - (k) Acknowledgment of solicitation amendments (if any)
 - (l) Past performance information, when included as an evaluation factor, to include recent and relevant contracts for the same or similar items and other references (including points of contact with telephone numbers, and other relevant information)
 - (m) **Special Note:** *The Seller, by his response to this RFQ/RFP and accompanying signatures, confirms that the terms and conditions associated with this RFQ/RFP document have been agreed to and all of its attachments have been carefully read and understood and all related questions answered.*
4. **Forms:** Sellers (potential bidders or suppliers) must record their pricing utilizing the format found on Attachment “A”. Sellers must sign the single hardcopy submitted and send to address listed on the cover page of this RFQ/RFP.
5. **Questions Concerning the Procurement.** All questions in regards to this RFQ/RFP to be directed to

Vianelis Tavarez, Office Coordinator
(insert name of procurement officer)

at this email address:

Email: vtavarez@rti.org

(insert email address of the procurement officer).

The cut-off date for questions is *(insert date)*.

25 July 2024

6. **Notifications and Deliveries:** Time is of the essence for this procurement. Seller shall deliver the items or services no later than the dates set forth in the contract that will be agreed by both parties as a result of this RFQ/RFP. The Seller shall immediately contact the Buyer's Procurement Officer if the specifications, availability, or the delivery schedule(s) changes. Exceptional delays will result in financial penalties being imposed of Seller.
7. **Documentation:** The following documents will be required for payment for each item:
 - (a) A detailed invoice listing Purchase Order Number, Bank information with wiring instructions (when applicable)
 - (b) Packing List
 - (c) All relevant product/service documentation (manuals, warranty doc, certificate of analysis, etc.)
8. **Payment Terms:** Refer to RTI purchase order terms and conditions found in https://www.rti.org/sites/default/files/documents/2024-03/rti-po-terms_English%20Version%20-%20v1.20.pdf, http://www.rti.org/files/PO_FAR_Clauses.pdf, or http://www.rti.org/files/PO_FAR_Clauses_Commercial_Items.pdf. Payment can be made via wire transfer or other acceptable form. Sellers may propose alternative payment terms and they will be considered in the evaluation process.
9. **Alternative Proposals:** Sellers are permitted to offer "alternatives" should they not be able to meet the listed requirements. Any alternative proposals shall still satisfy the minimum requirements set forth in Attachment A Specifications.
10. **Inspection Process:** Each item shall be inspected prior to final acceptance of the item. All significant discrepancies, shortages, and/or faults must be satisfactorily corrected and satisfactorily documented prior to delivery and release of payment.
11. **Evaluation and Award Process:** The RTI Procurement Officer will award an agreement contract resulting from this solicitation to the responsible Seller (bidder) whose offer conforms to the RFQ/RFP will be most advantageous to RTI, price and other factors considered. The award will be made to the Seller representing the **best value** to the project and to RTI. For the purpose of this RFQ/RFP, price, delivery, technical and past performance are of equal importance for the purposes of evaluating, and selecting the "best value" awardee. RTI intends to evaluate offers and award an Agreement without discussions with Sellers. Therefore, the Seller's initial offer should contain the Seller's best terms from a price and technical standpoint. However, RTI reserves the right to conduct discussions if later determined by the RTI Procurement Officer to be necessary.

The evaluation factors will be comprised of the following criteria:

- (a) **PRICE.** Lowest evaluated ceiling price (inclusive of option quantities) .
- (b) **DELIVERY.** Seller provides the most advantageous delivery schedule.
- (c) **TECHNICAL.** Items/Services shall satisfy or exceed the specifications described in RFQ/RFP Attachment A.
- (d) **PAST PERFORMANCE** - Seller can demonstrate his/her capability and resources to provide the items/services requested in this solicitation in a timely and responsive manner.
- (e) **OTHER EVALUATION CRITERIA.**

12. **Award Notice.** A written notice of award or acceptance of an offer, mailed or otherwise furnished to the successful supplier within the time acceptance specified in the offer, shall result in a binding contract without further action by either party.
13. **Validity of Offer.** This RFP in no way obligates RTI to make an award, nor does it commit RTI to pay any costs incurred by the Seller in the preparation and submission of a proposal or amendments to a proposal. Your proposal shall be considered valid for 90 days after submission.
14. **Representations and Certifications.** Winning suppliers under a US Federal Contract are required to complete and sign as part of your offer RTI Representations and Certifications for values over \$10,000.
15. **Certifications.**
Certification and Disclosure Regarding Payments to Influence Certain Federal Transactions - Certification and Disclosure Regarding Payments to Influence Certain Federal Transaction as referenced in FAR 52.203-11 is hereby incorporated into this Request for Proposal as a condition of acceptance.

Limitation on Payments to Influence Certain Federal Transactions- Limitation on Payments to Influence Certain Federal Transactions as referenced in FAR 52.203-12 is hereby incorporated into this Request for Proposal as a condition of acceptance.

16. **Anti- Kick Back Act of 1986.** Anti-Kickback Act of 1986 as referenced in FAR 52.203-7 is hereby incorporated into this Request for Proposal as a condition of acceptance. If you have reasonable grounds to believe that a violation, as described in Paragraph (b) of FAR 52.203-7 may have occurred, you should report this suspected violation to the RTI's Ethics Hotline at 1-877-212-7220 or by sending an e-mail to ethics@rti.org. You may report a suspected violation anonymously.
17. **The John S. McCain National Defense Authorization Act for fiscal year 2019 - section 889.** RTI cannot use any equipment or services from specific companies, or their subsidiaries and affiliates, including Huawei Technologies Company, ZTE Corporation, Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, and Dahua Technology Company ("Covered Technology"). In response to this request for proposal, please do not provide a quote which includes any Covered Technology. Any quote which includes Covered Technology will be deemed non-responsive. Additionally, if the United States Government is the source of funds for this RFP, the resulting Supplier shall not provide any equipment, system, or service that uses Covered Technology as a substantial or essential component

Acceptance:

Seller agrees, as evidenced by signature below, that the seller's completed and signed solicitation, seller's proposal including all required submissions and the negotiated terms contained herein, constitute the entire agreement for the services described herein.

By: *(Seller Company Name)*

Signature: _____

Title:

Date: