Request for Quote/Proposal (RFQ/RFP)

<table>
<thead>
<tr>
<th>Commodity/Service Required:</th>
<th>Capacity Building for Offshore Wind Power</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of Procurement:</td>
<td>Fixed Price</td>
</tr>
<tr>
<td>Type of Contract:</td>
<td>Purchase Order</td>
</tr>
<tr>
<td>Term of Contract:</td>
<td>Pricing should be fixed for 90 days</td>
</tr>
<tr>
<td>Contract Funding:</td>
<td>Task Order #7200AA19D00028/72049221F0002</td>
</tr>
<tr>
<td>This Procurement supports:</td>
<td>Energy Secure Philippines (ESP) Activity – a USAID funded project</td>
</tr>
<tr>
<td>Submit Proposal to:</td>
<td>Administrative Assistant, Karen Nicole Mamucud, kمام<a href="mailto:ucud@energysecure.ph">ucud@energysecure.ph</a> USAID’s Energy Secure Philippines Activity Office Address: Unit 1409 &amp; 1410, One Park Drive, 9th Ave. Cor. 11th Drive, BGC, Taguig City</td>
</tr>
<tr>
<td>Date of Issue of RFP:</td>
<td>October 28, 2022</td>
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<tr>
<td>Date Questions from Supplier Due:</td>
<td>November 7, 2022</td>
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<td><strong>Date Proposal Due:</strong></td>
<td><strong>November 11, 2022</strong></td>
</tr>
<tr>
<td>Approximate Date Purchase Order Issued to Successful Bidder(s):</td>
<td>November 15, 2022</td>
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**Method of Submittal:**

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: | ESP-RFP-2022-352 |

**Attachments to RFP:**

1. Attachment “A” – Commodity Specifications
2. Attachment “B” – Instructions to Bidders/Sellers

All PO Terms and Conditions are listed on our website at set-forth at: http://www.rti.org/POterms, 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 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.
Attachment A

Commodity Specifications

Description of Requested Commodity:

RTI is an implementing contractor of the United States Agency for International Development (USAID) for Energy Secure Philippines (ESP), a five (5) year project. Energy Secure Philippines (ESP) will assist the Philippines energy sector to mobilize investment, deploy modern energy technology, and support policy reforms for a more competitive energy sector that can drive future economic growth and social development.

To achieve these objectives, USAID ESP is looking for a team of experts who can conduct workshop sessions regarding offshore wind power projects. Thus, market research was undertaken to identify group of experts who can help in the said engagement. The bidders are expected to quote their prices, EXCLUSIVE OF VAT and DUTY FREE, for the following commodities/services. Prices must be marked as VAT exclusive, zero-rated or exempt in the quotation.

Requirement Specifications

Scope
Assemble a team of experts with in-depth know-how in offshore wind development and capacity building to design and conduct workshop sessions that will tackle the policy and regulatory aspects, financial aspects, project development approaches, and operations requirements of offshore wind projects.

There will be two broad activities to this assignment:
(i) Phase 1: Content Development and delivery of Series of capacity building workshops for diverse industry stakeholders that include the Philippines’ Department of Energy (DOE), Energy Regulatory Commission (ERC), senior government officers, transmission & distribution utilities, banks & financial institutions, and renewable energy developers.
(ii) Phase 2: Development support for Competency Standard for offshore wind sector in Philippines

Overview

<table>
<thead>
<tr>
<th>Phase 1a</th>
<th>Content Development</th>
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<tbody>
<tr>
<td></td>
<td>• Review of Philippines’ National Energy Development Plan and/or equivalent documentation</td>
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<td></td>
<td>• Review of present policies, regulations, and status quo regarding Offshore Wind in the Philippines</td>
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<tr>
<td></td>
<td>• Review of current market and global scenario for Offshore Wind projects development</td>
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<td></td>
<td>• Development of content for other sessions presentations</td>
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<tr>
<th>Phase 1b</th>
<th>Delivery of Capacity</th>
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<tbody>
<tr>
<td></td>
<td>• Series of workshops related to the policy &amp; regulatory assessment, market review &amp; analysis, financial aspects, project development</td>
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<tr>
<td>Building Workshops</td>
<td>Approaches, and operations requirements of Offshore Wind projects to delivered to multiple stakeholders</td>
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<td>-------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
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</table>
| Phase 2 Development Support for Competency Standard | - Assess gaps in current competencies and requirements  
- Identify required core competencies  
- Prepare a mapping report for competency standards development |

**Content Development**

The consultant shall:
- Assemble a team subject matter experts and talents that will prepare session presentations based on the tentative workshop agenda.
- Review existing local industry structure, energy goals, policy & regulatory aspects.
- Review of National Energy development Plan regarding offshore wind in Philippines
- Review of policies and regulations to be adopted by different stakeholders in Philippines to promote higher uptake of offshore wind.
- Review of market developments and analysis for offshore wind sector in Philippines as well as review of global scenario for offshore wind projects development
- Review of suitable policies and regulations adopted in other countries and develop case studies of 2-3 countries progressive in offshore wind sector for discussions with the relevant participants
- Share insights and strategies related to offshore wind development and integration from global experience.
- Identify gaps and suggest mechanisms to successfully integrate offshore wind to Philippine energy portfolio.

**Delivery of Capacity Building Workshops**

Responsibilities of the Consultant/Consulting Firm:
- Deliver plenary sessions and four (4) offshore wind workshops (max. 4 hours per day per workshop) across a period of 6 months to facilitate knowledge transfer.
- The presenters will be diverse experts
- The lectures and other materials will be provided through power point presentations on projection screens or shared virtually. An electronic copy of the presentation materials will be provided to the participants for later reference.
- The capacity building experience is planned to include audience participation in the form of group discussions, brainstorming, and/or sharing of experiences.
- No software demonstration is planned to be undertaken as part of these capacity building workshops.

**Responsibilities of RTI:**
- Mobilization of participants attending the four workshops and travel costs for workshop participants, if any
- Workshops venue costs including the training/conference room and other associated facilities as required, depending on the number of participants.
• Training will be delivered in conference style where desks and any stationary including notepads, pen, etc. to be provided as required
• Any other support for conducting the workshop including printing costs/logistics for sharing the presentations to the workshop participants as required.

**Development Support for competency standard**

Competency standard is an industry-determined specification of performance, which set out the skills, knowledge and attitudes required to operate effectively in employment. The approach towards development of competency standard is proposed as follows:

- Undertake stakeholder consultations for data collection to identify gaps in competencies and skills requirement for Offshore wind sector
- Identification of core competencies required for the Offshore wind sector
- Prepare a Competency mapping report for the Offshore Wind sector in Philippines to support in the development process of Competency Standards

**Phase I Task**

The project will include the design and delivery of four (4) offshore wind workshops for diverse stakeholders including combined plenary sessions for all stakeholders to be delivered by various experts. The workshop sessions will be delivered through a hybrid approach wherein at least one of the resource speakers will be physically present at the venue while other resource speakers may participate online depending on the travel requirements. The tasks include:

<table>
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<tr>
<th></th>
<th>Description</th>
<th>Topics Covered</th>
<th>Tasks</th>
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<tbody>
<tr>
<td>1</td>
<td>Design and delivery of plenary sessions Workshop 1a for all stakeholders</td>
<td>• Market Assessment</td>
<td>Content developers and delivery of plenary sessions</td>
</tr>
</tbody>
</table>
<pre><code>  |                                                                             | • Site feasibility and Technical Due Diligence for Offshore Wind Projects     |                                                                      |
</code></pre>
<p>| 2 | Design and delivery of Workshop 1b breakout sessions for                      | • Policy and regulatory assessment in global context                          | Content development for sessions to be delivered for Workshop 1        |
| Energy Regulatory Commission and senior government officers                 | • Environment and Social Impact Assessment                                    | Delivery of capacity building Workshop 1                             |
|                                                                             | • Business Models, Contracting Framework, associated challenges, and          | Report preparation and submission                                      |
|                                                                             |   mitigation techniques                                                        |                                                                      |
| 3 | Design and delivery of Workshop 2 for transmission and distribution utilities | • Offshore wind project development                                           | Content development for sessions to be delivered for Workshop 2        |
|                                                                             | • Grid connectivity &amp; inspection procedure                                    | Delivery of capacity building workshop 2                              |
|                                                                             | • Business models and Commercial Assessment                                   | Report preparation and submission                                      |</p>
|   | Design and delivery of Workshop 3 for banks & financial institutions | • Market Assessment & Business Models  
• Technical Assessment of Offshore Wind Projects  
• Commercial Assessment  
• Environment and Social Impact Assessment | Content development for sessions to be delivered for Workshop 3  
Delivery of capacity building workshop 3  
Report preparation and submission |
|---|---|---|---|
| 5 | Design and delivery of Workshop 4 for renewable energy developers | • Offshore wind design principle  
• Offshore Wind project development  
• Business models and Commercial Assessment | Content development for sessions to be delivered for Workshop 4  
Delivery of capacity building workshop 4  
Report preparation and submission |

**Phase 2 Task**

Phase 2 of the assignment is to identify the competencies, skills and knowledge required for the development of offshore wind sector in Philippines. The activities to be undertaken to support development of competency standards for Offshore Wind sector are as follows –

- Prepare materials for competency mapping
  - a) Identify the stakeholders to be contacted in discussion with Energy Secure Philippines program team and agreed on the scope of the assignment.
  - b) Prepare a questionnaire for to assess gaps and requirements regarding competencies, skills and knowledge required in the Offshore wind sector
  - c) Identify the value chain and a wide range of specialties required for the Offshore Wind sector in Philippines based on the global standards

- Conduct Competency mapping workshops
  - a) Based on the stakeholders identified, conduct 2 stakeholder consultation workshops with a diverse group of stakeholders for data collection from at least 10 different stakeholders, including but not limited to renewable energy organisations, regulators, and existing education stakeholders

- Undertake data review and analysis
  - a) Review and analysis of the data collected to identify the competencies required based on the value chain analysis and develop pyramid of competencies for specific categories (e.g., industry specific competencies, workplace competencies, personal effectiveness competencies, etc.)
b) Based on the competencies, identify the skills and knowledge areas required for development of Competency Standards of Offshore wind sector that support workforce preparation for wind-related jobs, protect the environment, improve safety, and strengthen the economy of the Philippines

- Prepare a Competency mapping report for the Offshore Wind sector in Philippines to support in the development of Competency Standards

**Deliverables**

**Phase 1:** Along with the conduct of workshops, the final presentation materials, attendance sheets, and a summary report will be provided to RTI (ESP team) for each workshop

**Phase 2:** Competency mapping report for the Offshore Wind sector in Philippines to support in the development of Competency Standards

### Pricing

<table>
<thead>
<tr>
<th>Item #</th>
<th>Quantity To be Purchased</th>
<th>Description of Preferred Commodity Specifications</th>
<th>Unit of Measure</th>
<th>Unit Fixed Price (Each)</th>
<th>Total Fixed Price</th>
</tr>
</thead>
</table>

### Requirements:

1. The Seller must submit all information and documentation listed in Section 3 of Attachment B - Instructions to Bidders/Sellers
2. The Seller must complete, sign, and submit Attachment C- Organizational Certification

By signing this attachment, the bidder confirms he/she 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

   | Unit 1409 & 1410, One Park Drive, 9th Ave. Cor. 11th Drive, BGC, Taguig City |
   | (insert full address of the office) |

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

   | US Agency for International Development (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.

   This procurement is open to offers from providers in the US and the Philippines.

   Bidder must include the following information, on a Letterhead or the company, signed and stamped:

   (a) Solicitation number: ESP-RFQ-2022-352

   (b) Date and time submitted:
(c) Name, address, and telephone number of the seller (bidder) and authorized signature of same:

(d) Validity period of Quote: 90 days

(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:

(h) 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.

Prices should be duty-free and exclude VAT and other taxes. RTI will provide the necessary exemption documentation.

The price quotation must be in Philippine Peso (for Philippines-based offerors) or USD (for US-based offerors).
All offerors must provide a price guarantee that the quotation price remains valid for 90 days.

(i) Payment address or instructions (if different from mailing address)

(j) Acknowledgment of solicitation amendments (if any)

(k) Past performance information, to include recent and relevant contracts for the same or similar items and other references

Please provide a description of prior experience, including the following:

i. Names; ii. Addresses; iii. Contact persons; iv. Telephone numbers

(l) Bidder should submit Legal Registration Documents such as (in Philippines) or equivalent (if in the US):

   i) SEC registration
ii) Business Permit

iii) BIR Registration

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 email address listed on the cover page of this RFQ/RFP.

5. **Questions Concerning the Procurement.** All questions in regard to this RFQ/RFP to be directed to

Karen Nicole E. Mamucud

(insert name of procurement officer)

at this email address:

kmamucud@energysecure.ph

(insert email address of the procurement officer).

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

November 7, 2022

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/statement of account listing Purchase Order number and showing number of units and per unit price to calculate total amount due.
   b. Bank information for EFTs being on file with ESP Activity
   c. Operators and Maintenance Manuals if applicable
   d. Warranty Documents if applicable

9. **Payment Terms:** Refer to RTI purchase order terms and conditions found in
   http://www.rti.org/files/PO_FAR_Clauses_Commercial_Items.pdf. Payment can be made via EFT or checks only.

10. **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.

11. **Inspection Process:** Each item shall be inspected prior to final acceptance of the item.
significant discrepancies, shortages, and/or faults must be satisfactorily corrected and satisfactorily documented prior to delivery and release of payment.

12. **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:

- **Price.** Lowest evaluated ceiling price (inclusive of option quantities).
- **Delivery.** Seller provides the most advantageous delivery schedule.
- **Technical Capacity.** Items/Services shall satisfy or exceed the specifications describe in RFQ/RFP Attachment A.
- **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.
- **Other Considerations**

13. **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 after the countersigning by the seller/bidder.

14. **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.

15. **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.

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.

**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: ________________