Request for Quote/Proposal (RFQ/RFP)

<table>
<thead>
<tr>
<th>Commodity/Service Required:</th>
<th>Consulting Firm for Philippine Energy Plan (PEP) 2023-2050’s Strategic Transmission Plan (STP)</th>
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<tbody>
<tr>
<td>Type of Procurement:</td>
<td>One-Off Purchase Agreement</td>
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<tr>
<td>Type of Contract:</td>
<td>Fixed Price</td>
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<tr>
<td>Term of Contract:</td>
<td>6 months</td>
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<td>Contract Funding:</td>
<td>USAID</td>
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<tr>
<td>This Procurement supports:</td>
<td>USAID – Energy Secure Philippines Activity</td>
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</table>
| Submit Proposal to:        | Jan Ranizen F. Vitan  
  Grants and Procurement Analyst, ESP  
  RTI International  
  jvitan@energysecure.ph |
| Date of Issue of RFP:      | July 27, 2023                                                                     |
| Date Questions from Supplier Due: | August 3, 2023  
  Send your questions to:  
  jvitan@energysecure.ph |
| Date Proposal Due:         | August 10, 2023  
  not later than 5:00 PM Manila time |
| Approximate Date Purchase Order Issued to Successful Bidder(s): | August 11-15, 2023 |

**Method of Submittal:**

Email to: **jvitan@energysecure.ph**

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-RFQ_P-2023-226**

**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 forth at:  
   https://www.rti.org/sites/default/files/rti-purchase-order-terms-and-conditions-v1.16.pdf,  
   http://www.rti.org/files/PO_FAR_Clauses.pdf or for commercial items:  
   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.
Description of Activity/Service:

The main goal for this engagement is to support the Department of Energy and TransCo in its efforts to assess and formulate a strategic transmission plan which will be integrated in the PEP 2023-2050 update.

The services rendered will be crucial in enhancing the capacity of the government in decision-making and producing efficient and effective energy plans and programs, which will contribute to the overall development of the energy sector. This will entail conducting rigorous assessments of the country's transmission system, identifying its strengths and weaknesses, and recommending strategies to address potential issues.

The expertise and recommendations provided will also consider the attainment of the country’s energy security and sustainability goals, as well as the need to ensure that electricity supply remains reliable, efficient, and cost-effective for the consumers.

Specifically, this undertaking aims to:

1. Strengthen the competencies of the DOE and TransCo technical personnel through advisory services, consultations, and simulation exercises on the following, but not limited to, aspects pertaining to the preparation of the STP:
   a. transmission system planning requirement
      - peak demand forecasting up to transformer level
      - load flow studies
      - short-circuit analysis
      - transient stability analysis
      - steady-state stability analysis
      - voltage stability analysis
      - electromagnetic transient analysis
      - reliability analysis
      - power quality analysis
      - congestion analysis
      - dynamic stability analysis including frequency analysis
b. reliability assessment

c. facility connection requirements

d. voltage support and reactive control

e. significant incident monitoring and assessment

f. system modeling data requirements
   - generating plant equipment
   - transmission modeling (2022-2040 PSSE Base Case and electrical network models for Luzon, Visayas, and Mindanao (.sav and .sld files); Transmission line and Power Transformers Parameters (X1, X2, X0) in per unit; Dynamic data in PSSE for Luzon, Visayas, and Mindanao grid (.dyr file); 2022-2040 Projected peak demand forecast (coincident and non-coincident) up to power transformer/substation level; and Latest single line diagram with the 69 kV networks for Luzon, Visayas, and Mindanao)
   - facility ratings
   - demand characteristics

g. formulation of project options, project evaluation, selection, and documentation

h. planning for interconnection of viable off-grid islands into the Grid

2. Provide inputs and recommendations for improving the current methodologies being employed by the DOE and TransCo and its Concessionaire in transmission system planning.

3. Support the DOE and TransCo in the drafting of the PEP- STP.

4. Identify gaps in policy and its implementation and propose strategies to address such.

The Consulting Firm will work closely with the DOE and TransCo to analyze the current and projected state of the transmission system and identify areas that require improvement. The scope of their services will cover a wide range of areas, including transmission system planning, improvements in the power grid’s operational efficiency, and the integration of RE sources and energy storage systems into the grid.

Moreover, the technical experts will conduct extensive research and analysis to assess the feasibility and impact of proposed strategies and technologies, as well as identify potential risks and challenges that may arise. They will also provide guidance on best practices and standards in energy planning and management, as well as support in capacity building and training for relevant government agencies and stakeholders.

Additionally, the Consulting Firm will evaluate the electricity demand and supply projections and recommend strategies to enhance the transmission system’s capacity, reliability, and performance,
including the potential interconnection of off-grid islands to the main grid.

Product or Service Expectations (both if applicable):

In general, the Consulting Firm will provide advisory and consultation services to the DOE and TransCo, leveraging their expertise to offer guidance on transmission system planning. Specifically, the following are the expected deliverables and outputs from the Consulting Firm, which are designed to improve the transmission infrastructure of the country:

1. To aid in planning and forecasting future transmission requirements, the Consulting Firm will determine the corresponding data requirements, as well as support in validating and refining current models and assumptions that are more accurate and useful to the DOE and TransCo;
2. Produce a technical report and analysis based on simulations of the transmission system, highlighting significant findings, issues and challenges, and potential solutions;
3. Assist in the preparation of an implementation plan for the National Grid Corporation of the Philippines (NGCP), which will detail the steps required to implement the recommendations outlined in the technical report;
4. To improve the TEP and PEP formulation, provide policy recommendations, including regulatory frameworks, infrastructure investments, and other strategies to enhance the transmission grid; and
5. Provide inputs and expert advice in the drafting of narrative write-ups on the PEP 2023-2050’s strategic transmission development sub-chapter, which covers a comprehensive overview of the current and projected state of the transmission grid, and the projected capital investment program for the infrastructure.
6. Facilitate the conduct of meetings, workshops, and capacity-building programs for the DOE and TransCo technical personnel.

Deliverables, Timelines, Special Terms and Conditions:

The Consulting Firm shall submit a written report as required by the Contract. All information, outputs, and deliverables shall be for the exclusive use of the DOE and TransCo and cannot be reproduced or used by the Consulting Firm for other purposes, without the consent and the approval of the DOE.

The Consulting Firm shall submit the reports on the following schedule:

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<tr>
<th>Deliverables</th>
<th>% Scope of Work</th>
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<tr>
<td>1. Presentation of STP methodology</td>
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<td>2. Initial result for the reference scenario and alternative scenarios</td>
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### 3. Final result for all scenarios

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### 4. Technical report and analysis on simulations of the transmission system

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### 5. Inputs on the narrative report on the PEP 2023-2050 Strategic Transmission Development subchapter

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### 6. Policy recommendations to institutionalize the preparation of the STP and inputs on the implementation plan for NGCP

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### 7. STP Appendix for the PEP

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The Consulting Firm shall faithfully render the services and commits to perform with the highest professional and ethical standards in accordance with pertinent rules, policies, and guidelines of the DOE and TransCo. The Consulting Firm may work beyond normal work schedule, as deemed necessary, to facilitate the completion of the project.

In the performance of its functions and duties, the Consulting Firm will necessarily acquire personal, official, or confidential information. In light of the foregoing, the Consulting Firm agrees not to disclose, to any third party, copy or reproduce any such confidential or proprietary information, even after the termination of this Contract, unless authorized in writing by the DOE. All official or confidential records that the Consulting Firm has in its control as a result of its engagement with the DOE and TransCo must be turned over to the Department upon termination of the Contract. This obligation shall survive even after the termination of the Contract.

### Pricing
### Additional Information for Delivery Schedule:
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.

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<td>Title:</td>
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<td>Date:</td>
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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

<table>
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<tr>
<th>RTI International c/o USAID Energy Secure Philippines Activity</th>
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<tr>
<td>Unit 1409&amp;1410, One Park Drive, 9th Ave. cor 11th Drive, BGC, Taguig City</td>
</tr>
</tbody>
</table>

(insert full address of the office)

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

| USAID Philippines |

(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

| Jan Ranizen F. Vitan, Grants and Procurement Analyst |
| (insert name of procurement officer) |

at this email address:

| jvitan@energysecure.ph |
| (insert email address of the procurement officer). |

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

| Thursday, August 3, 2023 |
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 on 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.)


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**.
Warranty and Payment Terms

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. **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.

16. **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: ________________________________