

TERMS OF REFERENCE

Technical support for ETP for the The Philippines Grid Diagnostic: Smart Grid Development

A. Background Information

1. The Southeast Asia Energy Transition Partnership (ETP) brings together governments and philanthropies to work with partner countries in the region. We support the transition towards modern energy systems that can simultaneously ensure economic growth, energy security, and environmental sustainability. Enabling the transition toward greener energy systems will greatly contribute to the achievement of the UN's Sustainable Development Goals (SDGs) and the Paris Climate Agreement objectives.
2. ETP is funding a pioneering technical assistance project for the [Philippines Grid Diagnostic: Smart Grid Development](#). The project has been awarded by ETP to a consulting firm. It will address two key challenges, facing the country as it upgrades its power grid to be smart grid compatible and be able to integrate an increasing share of variable renewable energy in the generation mix.

B. Purpose and Scope of this Assignment

3. ETP is seeking the support of a Consultant for the technical review of the outputs of this project. The selected entity will provide ETP Secretariat following services:
 - a. Assist ETP Secretariat with the quality control of the project, providing technical and issue specific expertise in the areas under the technical assistance;
 - b. Assist ETP Secretariat with technical review of all project deliverables; and
 - c. Support ETP Secretariat with written or verbal explanations on the project, its scope and objectives, and intentions to accelerate energy transition in the Philippines, with particular focus on electrical engineering, transmission and distribution network analysis, ancillary services and connections with ancillary services projects conducted through other funding, and other linkages of the project;
 - d. Participate in technical and other problem resolution activities and meetings online as requested by ETP Secretariat to ensure that the project is executed to the quality expected under international standard regarding each component of the project, help/guide ETP Secretariat staff with problem resolution in case issues arise both in writing and verbally outlining strategies and tactics to correct the course of the project, Identify and assess

opportunities to enhance the quality and the comprehensiveness of the project and its delivery by the engaged consulting firm.

4. The consultant will support ETP Secretariat with intermittent services throughout the project period to Mid-2023 or the closing date of the project. It is estimated that the total number of person days required to perform this consultancy is 40 days.

C. Consultant Requirements

5. ETP is looking for a Company or Consultant Firms to render the services detailed in the scope of work, and must meet the following requirements:

- a. The company should have 5 years experience providing similar services, similar service in this case is defined as providing technical advisory services on areas covering transmission network, smart grid, RE integration and related topics
- b. The company should demonstrate extensive experience of working on grid modernisation
- c. Experience working with government agencies / multilateral organizations / UN organizations will be an asset

6. The team proposed should meet the following requirements:

- The **lead** individual should have the following qualifications:

1. Education

- The project lead should have at least a Masters Degree in Energy, Engineering, Energy Economics.

2. Work Experience

- a. A minimum of 10 years of relevant experience in similar role, with minimum 5 years of leadership experience
- b. Professional experience in grid technology, digitalization, grid flexibility and integration issues, technical, governance, economics, financial, and packaging of grid investment requirements. Experience or knowledge of the Philippines' power sector is desired.
- c. Professional experience in energy system modeling and forecasting
- d. Knowledge of, energy transition, political, economic and social situation in the Philippines is desired

- e. Previous successful involvement with, and good knowledge of, donor, government, private sector and civil society is desired
- f. Computer literacy in Microsoft packages (MS Word, MS Excel, MS Access, MS Power Point) is required

3. Language

- Fluency in written and spoken English is essential.

4. Expertise

- Bidders should propose expert/s who have the required skills, knowledge, and experience to provide the service within the timeframe outlined in this Terms of Reference. While ETP does not prescribe the composition of the team, the below list might be used as a reference on the expertise that the proposed team needs to have

1. Electrical Engineer	Master degree + 5 years of professional experience
2. Smart Grid Modernization Expert / similar role	Master degree + 5 years of professional experience

One of the consultants should be identified as the team lead, and the one identified as team lead should fulfill the requirements as the team leader as specified in the previous section

- The bidder should also assign a Contract Manager who would liaise on the non-technical part of the contract implementation, including coordination, liaising with key counterparts, liaising with UNOPS on submission of invoices and payment-related documents.

D. Evaluation Criteria

7. Eligibility and Formal Criteria

The criteria contained in the table below will be evaluated on Pass/Fail basis and checked during Preliminary Examination of the proposals.

Criteria	Documents to establish compliance with the criteria
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1. Offeror is eligible as defined in the document Section I: Instructions to Offerors, Article 4. In case of JV, all JV members should fulfill this requirement	<ul style="list-style-type: none"> • Form A: Joint Venture Partner Information Form, all documents as required in the Form, in the event that the Proposal is submitted by a Joint Venture. • Form B: Quotation Submission Form
2. Completeness of the Quotation. All required Questionnaires (if any), and Returnable Bidding Forms and other documentation requested under the Document Checklist section have been provided and are complete	<ul style="list-style-type: none"> • All documentation as requested under Instructions to Offerors Article 10, Documents Comprising the Proposals
3. Offeror accepts UNOPS General Conditions of Contract as specified in Section IV: Contract Forms	<ul style="list-style-type: none"> • Form B: Quotation Submission Form

8. Qualification Criteria

The criteria contained in table below will be evaluated on Pass/Fail basis and checked during Qualification Evaluation of the proposals.

Criteria	Documents to establish compliance with the criteria
1. The company should have 5 years experience providing similar services. Similar service in this case is defined as providing technical advisory services on areas covering transmission network, smart grid, RE integration and related topics	<ul style="list-style-type: none"> • Certification of incorporation of the Offeror • Form E: Previous Experience Form
2. Offeror must provide a minimum of two (2) customer references from which demonstrate extensive experience of working on grid modernisation	<ul style="list-style-type: none"> • Form E: Previous Experience Form

9. Technical Criteria

Technical evaluation will be carried out to bids that pass the eligibility, formal and the qualification criteria, with requirements as follows:

- The maximum number of points that a bidder may obtain for the Technical proposal is 80. To be technically compliant, Bidders must obtain a minimum of 56 points
- Minimum pass score: 70% of maximum 80 points = 56 points

Technical proposal points allocation

Section number/description		Points Obtainable
1	Offeror's qualification, capacity and expertise	30
2	Proposed Methodology, Approach and Implementation Plan	25
3	Key Personnel proposed and Sustainability Criteria	25
Total Technical Proposal Points		80

Technical Criteria - Section 1

Section 1: Offeror's qualification, capacity and expertise		Points	Sub-points
1.1	Brief description of the organization, including the year and country of incorporation, and types of activities undertaken, including relevance of specialized knowledge and experience on similar engagements done in the past. Bidders partnering up with a Filipino entity to provide for the strategic consultation, translations; as well as the communications expertise is considered a valuable asset. (Max 4 pages written text plus 1 Matrix)	25	
	Experience in projects of comparable size, type, complexity and technical specialty		10

	Experience in providing similar services in the region, especially Philippines		5
	Understanding of local context, and partnering up with a Filipino entity to provide for the strategic consultation, translations; as well as the communications expertise		10
1.2	General organizational capability which is likely to affect implementation: management structure, and project management controls. (Max 4 pages written text)	5	
	Management structure, management controls, and extent to which any part would be subcontracted		
Total points for section		30	

Technical Criteria - Section 2

Section 2: Proposed Methodology, Approach and Implementation Plan		Points	Sub-points
2.1	Description of the Offeror's approach and methodology for meeting or exceeding the requirements of the Terms of Reference	15	
2.2	Quality Assurance	5	
	A plan outlining how the bidder intends to ensure oversight and quality assurance throughout the assignment. Quality Assurance plan should include discussion on risk-assessment and its mitigation plan		5
2.3	Implementation Timeline	5	
	Bidder submits a detailed implementation timeline which includes detailed activities to be undertaken		5

	during this assignment, and is completed with gantt chart		
Total points of the section		25	

Technical Criteria - Section 3

Section 3: Key personnel proposed and Sustainability Criteria		Points	Sub-points
3.1	Qualifications of key personnel proposed	20	
	1. Team lead, who doubles up with the role Electrical Engineer / Smart Grid Modernization Expert		12
	2. Other team member not assigned as team lead		8
3.2	The bidder shall provide a response that demonstrates its commitment to support gender equality through its operations	5	
Total points of the section		25	

The Scoring Matrix for Key Personnel

Title	Minimum Qualification	Preferred experience	Marking	Max Points
Team Lead	A minimum of 10 years of relevant experience in similar role, with minimum 5 years of leadership experience Computer literacy in Microsoft packages (MS Word, MS Excel, MS Access, MS Power Point) is required	Professional experience in grid technology, digitalization, grid flexibility and integration issues, technical, governance, economics, financial, and packaging of grid investment	Related Experience More than 10 years : 12 points 9-10 years : 10-11 points 4-8 years :5-9 points	12

		<p>requirements. Experience or knowledge of the Philippines' power sector is desired</p> <p>Professional experience in energy system modeling and forecasting Knowledge of the, energy transition, political, economic and social situation in the Philippines is desired</p> <p>Previous successful involvement with, and good knowledge of, donor, government, private sector and civil society is desired</p>		
Electrical Engineer	Master degree in Electrical Engineering	5 years of relevant professional experience	<p>Related Experience</p> <p>More than 5 years : 8 points 4-5 years : 6-7 points 2-3 years : 4-5 points</p>	8

Smart grid modernization expert	Master degree in related field	5 years of relevant professional experience	Related Experience More than 5 years : 8 points 4-5 years : 6-7 points 2-3 years : 4-5 points	8
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E. Financial Criteria (20 maximum points)

- The financial part of those proposals that are found to be technically compliant will be evaluated as follows.
- The maximum number of points that a bidder may obtain for the Financial Proposal is 20. The maximum number of points will be allocated to the lowest evaluated price bid. All other prices will receive points in reverse proportion according to the following formula:
- Points for the Financial Proposal of a bid being evaluated =
$$\frac{[\text{Maximum number of points for the Financial Proposal}] \times \{\text{Lowest price}\}}{[\text{Price of proposal being evaluated}]}$$
- Financial proposals will be evaluated following completion of the technical evaluation. The bidder with the lowest evaluated cost will be awarded (20) points. Financial proposals from other bidders will receive prorated points based on the relationship of the bidder's prices to that of the lowest evaluated cost.

Formula for computing points: Example

Points = (A/B) Financial Points
Bidder A's price is the lowest at \$20.00. Bidder A receives 20 points
Bidder B's price is \$40.00. Bidder B receives $(\$20.00/\$40.00) \times 20$ points = 10 points

- The total score obtained in both Technical and Financial proposals will be the final score for the proposal, with 80% allocated to the Technical proposal and 20% to the

Financial proposal. The proposal obtaining the overall highest score will be considered as the winning proposal. This proposal will be considered to be the most responsive to the needs of UNOPS in terms of value for money.

- The selection of the preferred bidder will be based on a cumulative analysis, analyzing all relevant costs, risks and benefits of each proposal throughout the whole life cycle of the services and in the context of the project as a whole. The lowest priced proposal will not necessarily be accepted.

10. Deliverables

Item No.	Description
1	Assist with technical review of project deliverables, specifically on the Roadmap for Regulatory and Investment Upgrades; and the Review of the Electricity Governance Structure
2	Advise ETP on project status and provide guidance on the overall progress of the Philippines Grid Diagnostic: Smart Grid Development