USAID INVEST Project
1440 G Street NW, 10th Floor
Washington, DC 20005
INVEST_Procurement@dai.com

To: Offerors

Date: September 11, 2020

From: Procurement and Partnerships Team, INVEST Project; Implemented by DAI Global, LLC

Subject: Request for Proposals (RFP) INVEST-064: Investing for Security - Mobilizing Developing World Participation in Open Network Standard Setting Process

Due: **1:00 PM EDT on Friday, October 9, 2020**

Dear Offerors:

Enclosed is a Request for Proposals (RFP) to support the implementation of DAI's INVEST project funded by the United States Agency for International Development (USAID). DAI invites firms to submit a proposal for work with the USAID Global Development Lab, Center for Digital Development.

I. **RFP Process and deadlines:** This solicitation will result in the award of one (1) Fixed Price subcontract. The **ceiling of the awarded subcontract** is expected to be $150,000. Please note that because INVEST anticipates making only **one (1) award within the stated ceiling,** Offerors should submit a proposal that is priced competitively for the stated work.

1. Submission of Questions – Questions must be submitted no later than **1:00 PM EDT on Friday, September 18, 2020** via email to **INVEST_Procurement@dai.com**.
2. Submission of Proposals – Proposals must be submitted no later than **1:00 PM EDT on Friday, October 9, 2020** via email to **INVEST_Procurement@dai.com**, copying Matthew_Mitchell@dai.com, Talin_Baghdadlian@dai.com and Katherine_Tilahun@dai.com. The subject line of the email should be your organization name, followed by "Submission under RFP INVEST-064: Open Network Standard Setting Process." Please certify in your submission email a validity period of 60 days for the price(s) provided and include your organization's DUNS number. Please limit file submissions to 10 megabytes or less.

II. **Composition of Proposal:** Your organization's proposal should comprise of the following submission documents. The Technical Proposal and Cost Proposal should be prepared as separate files for independent evaluation, as follows below. Technical Proposals should be submitted as a slide deck of no more than ten (10) slides with a minimum font size of 12, and graphics with a minimum font size of 10. Graphics may be included, so long as text is clearly legible. If text or graphics are of poor resolution, the information provided may not be considered. Submissions in PowerPoint or in PDF are acceptable, although PDF is preferred along with an accompanying PowerPoint document. Please provide a copy of your Cost Proposal in Excel format.

Part 1 – Technical Proposal

Please limit your technical proposal to no more than **ten (10) slides**. The technical proposal is composed of the following three (3) sections:

1. **Technical Approach** – Offerors will detail their approach to fulfilling the accompanying Statement of Objectives (SOO). The approach will clearly indicate how the proposed activities will result in the successful completion of all deliverables and milestones.

2. **Institutional Capacity** – Offerors should provide details about the experience, networks, expertise, and/or capacity of the firm (or firms if a partnering arrangement is being proposed) or individual to carry out the proposed approach and complete the work as described. This should also include past performance information for similar activities.

3. **Management Plan/Staffing Structure –** Offerors should include details of personnel who will be assigned to the activities described in the technical approach, as well as a clear management plan in narrative form for the development, review, and submission of all associated deliverables, including a milestone schedule.

   Offerors are not required to be members of the Partner Network and are permitted to engage in partnering arrangements if it will aid in providing best value to USAID, regardless of whether organizations belong to the Partner Network. If a partnering arrangement is being proposed, please describe the nature of the arrangement, the specific technical value being contributed by each member of the team, and the appropriate management controls to ensure successful delivery. Firms may consider partnering with other firms that bring in complementary skill sets and experience.

   In addition to the above, please include the following:

- One (1) to two (2) examples of past performance relevant to this activity (limited to two (2) slides/pages per example). Examples should be within the past 5 years.
- CV(s) of any individuals proposed in the staffing plan to conduct this activity (limited to two (2) slides/pages per individual)

NOTE: These inputs (past performance examples and CVs) will not be counted as part of the 10-slide limit and the format may be PDF or Word. A cover page will be considered a non-counting page, and offerors should include one and list on it the names of all firms/individuals participating in the bid. No additional annexes or documentation are requested at this time.

<u>Part 2 – Cost Proposal</u>

The contract type for this activity is expected to be one (1) Firm Fixed Price Subcontract issued by DAI Global, LLC. Please include your total proposed fixed price along with details for specific deliverable pricing. *Please note that INVEST anticipates making only one award within the stated ceiling and Offerors should submit a proposal that at or below the total stated ceiling amount*. We encourage all

offerors to price their work competitively based on their experience carrying out similar types of work.

Offerors must also include a cost breakdown of the daily/hourly rates for proposed personnel, any other direct costs, indirect costs, and fees if applicable, with a build-up to their total proposed price or include substantiating price reasonableness documentation/justification. Cost breakdowns included will be utilized to determine price reasonableness. Offerors can use the attached cost/budget template for guidance, but are not required to use it, as long as the cost proposal captures the necessary elements (i.e. deliverables table with breakdown of how the deliverable totals were calculated).

Part 3 – Evaluation of Proposal

Evaluation of Proposal: DAI will use best value determination for the award of this Request for Proposals. A best value determination means that, in DAI's estimation, the selected offeror(s) will provide the greatest overall benefit to USAID in response to the requirements stated in this RFP. DAI may also exclude an offer from consideration if it determines that an Offeror is "not responsible", i.e., that it does not have the management and/or financial capabilities required to perform the work required. Proposals will be evaluated against a stated number of factors, including the overall proposed approach, past performance, specific qualifications in the identified sectors and other evidence substantiating the bidder's ability to deliver, including budget and time frame considerations. Specific preference will be shown for firms/individuals with demonstrated experience supporting research efforts, connecting companies and organizations to work together to advance shared goals, and facilitating the inclusion of developing country stakeholders in standard setting processes, particularly in the telecommunications sector.

1. **Technical Proposal:** The Technical Proposal will be scored and evaluated separately from the Cost Proposal. Technical panel reviewers will evaluate offerors on the following factors, consistent with the offerors' Technical Proposal. The Technical Proposal will be evaluated against the following criteria:

    a. **Technical Approach (30 points)** - Points for this section will be awarded based on the information presented in the technical approach. Points will be awarded to firms describing their thoughtful approach to addressing the Statement of Objectives (SOO). The offeror will be scored based on its presentation of a clear approach which reflects the requirements of this specific activity but also incorporates the offeror's competencies. The technical approach should clearly demonstrate the offeror's specific approach(es) to supporting the USAID Global Development Lab, Center for Digital Development (CDD) research efforts that will help develop a business case for implementing virtualized network architectures in developing countries and facilitating the facilitating the inclusion of developing country stakeholders in standard setting processes. **In particular, Offerors should indicate their capabilities in the following areas:**

- Approach to developing a business case for implementing virtualized network architectures in developing countries;
- Ability to identify and connect developing country stakeholders operating in the virtualized network architecture ecosystem with U.S. companies/organizations, investors, and developing country engineers and decision-makers; and
- Strategy of facilitating of the inclusion of developing country stakeholder 'voices' in the O-RAN Alliance and Telecom Infra Project standards process.

b. **Institutional Capacity (50 points)** – Points for this section will be based on information presented in the corresponding section and any submitted past performance case studies. In line with their technical approach, the offeror should demonstrate their:
   - Capability to develop high-quality tools and materials customized for multiple audiences to educate on the value of open, virtualized network architecture, including the development impact;
   - Capacity to create succinct resources and deliver trainings that translate and distill the complexity of the virtualized network architecture ecosystem into clear, concise, easily understandable information that introduces USAID Mission staff and other relevant stakeholders to the importance of network design in development;
   - Experience conducting research and compiling comprehensive reports, with telecommunications and/or ICT research preferred;
   - Extensive knowledge of the telecommunications industry, including familiarity with mobile broadband, virtualized or open network architectures, and wireless network deployment;
   - Familiarity and experience with developing country contexts;
   - Advanced knowledge of and familiarity with USAID's Private Sector Engagement Policy and the newly-released Digital Strategy; and
   - Access to and experience working with investors, technology providers, regulators and other stakeholders on telecommunications and ICT, particularly in the wireless industry.

c. **Management Plan/Staffing Structure (20 points) -** Points for this section will be based on the qualifications of proposed staff, clear delineation of the roles and responsibilities of each proposed staff and each proposed firm (if firms are partnering), and the demonstrated efficacy and clarity of the management plan. Proposals should provide a clear management plan in narrative form for the development, review, and submission of all associated deliverables, including a proposed milestone schedule. If the offeror is submitting a proposal with partners, the proposal should describe the nature of the arrangement (i.e. added technical value), the division of labor among the partners, and the appropriate management controls to

ensure successful delivery. The offeror should demonstrate their proposed staff's:

- Management plan for proposed activities, including clearly identified roles for each partner (if applicable);
- Timeline and deliverables that will result in objectives of SOO being met;
- Experience of staff to successfully implement objectives of the SOO; and
- Knowledge and experience working with investors, technology providers, and regulators on telecommunications and ICT, particularly in the wireless industry.

2. **Cost Proposal:** Cost will be evaluated separately from the technical approach, with due consideration for realism, price reasonableness, and allowability consistent with US government cost principles. Evaluation for this section will be dependent upon all information presented by the Offeror in their deliverable table and supporting cost information, as well as its alignment with the proposed technical approach.

Offeror's Agreement with Terms and Conditions: The completion of all RFP requirements in accordance with the instructions in this RFP and submission to DAI of the technical and price proposals will constitute an offer and indicate the Offeror's agreement to the terms and conditions in this RFP and any attachments hereto. DAI is not required to accept and/or evaluate proposals that do not conform to the instructions of the RFP, and additionally, DAI may reject all proposals and not award a subcontract for this RFP. DAI reserves the right to award a subcontract without discussion and/or negotiation; however, DAI also reserves the right to conduct discussions and/or negotiations, which among other things may require an Offeror(s) to revise its proposal (technical and/or price). By submitting an offer, Offerors agree to comply with the general terms and conditions for an award, including Representations and Certifications compliance. Offerors must provide full, accurate, and complete information in response to this solicitation. By submitting an offer, Offerors certify that they have not/will not attempt to bribe or make any payment to DAI employees in return for preference. Issuance of this RFP in no way obligates DAI to award a subcontract, nor does it commit DAI to pay any costs incurred by the Offeror in preparing and submitting the proposal. DAI reserves the right to award a subcontract to one organization or to issue multiple awards to different organizations based on the results of our evaluation

Thank you,

DAI INVEST Procurement and Partnerships Team
INVEST_Procurement@dai.com

Statement of Objectives for RFP INVEST-064
USAID's U.S. Global Development Lab, Center for Digital Development – Investing for Security: Mobilizing Developing World Participation in Open Network Standard Setting Process

INTRODUCTION:

Through INVEST, USAID seeks to unlock the potential of private capital to drive inclusive growth. Increasingly, private investors and businesses are looking to emerging markets for better returns and new market opportunities. Encouraging investment in high-impact areas important to USAID such as agriculture, financial services, infrastructure, energy, clean water, health, and education, requires new forms of collaboration between USAID and the investment community. Specifically, USAID can leverage its resources – grants, technical assistance, guarantees, and convening power – to help raise awareness of investment opportunities, lower transaction costs, and mitigate the risk of investments that generate positive social, economic, and environmental impact.

Through INVEST's flexible buy-in mechanism, USAID Missions and Operating Units are able to access an unprecedented network of firms and individuals that have the range of technical expertise needed to identify opportunities and effectively mobilize private capital toward development priorities. Using a lean approach tailored to high potential opportunities, relevant parts of the network will come together to research, develop, and build specific solutions that align private capital with development needs.

BACKGROUND:

The USAID Global Development Lab, Center for Digital Development (CDD) works to address gaps in internet and mobile network access and affordability, and to advance the secure, inclusive, and effective use of technology in developing countries. By supporting these countries as they build their commitments and capacity to fully harness the power of digital technology, CDD helps improve the lives of millions of poor and vulnerable people throughout the world and promotes a path to self-reliance for these communities by supporting the development of secure, inclusive, and resilient digital ecosystems.

CHALLENGE:

Next-generation wireless technologies fuel the digital economy in both developed and developing countries. The explosion of such technologies is changing the ways companies operate, communities communicate, and governments govern. However, gaps in availability and adoption in low-income countries and communities exacerbate the digital divide, resulting in disparities in economic outcomes, resilience, security and inequality between those who have safe and reliable internet access and those who do not. In addition, many developing country governments, network operators, and investors lack sufficient capacity and expertise to address network security concerns expressed by vertically integrated wireless network equipment vendors, limiting the effective deployment of reliable and secure networks.

Standards being developed through the Telecom Infra Project and the Open Radio Access Network (O-RAN) Alliance have the potential to answer network security challenges presented by vertically integrated network equipment vendors in the long- term. These standards, backed by

a diverse array of mobile network operators and technology companies will help establish fully virtualized wireless network architectures that separate hardware construction from software design, similar to how PCs evolved and surpassed mainframe computer architectures.

This disaggregated approach to network design could dramatically lower costs for network operators, offer investors and government entities in developing countries the investment opportunities to enter the network hardware manufacturing industry (as is happening with mobile devices), provide opportunity for software development, and present a long-term solution to wireless network security challenges. In particular, separating the software design phase from the hardware construction process will enable local firms to manufacture and assemble network equipment.

However, outside of the telecom industry, the business opportunities associated with virtualized, open network architecture are not well understood, particularly by investors and policymakers. This is particularly the case in developing countries, where telecom and Information and Communication Technologies (ICT) policymakers frequently do not have access to the same technical, legal, and engineering capacity to study and fully assess the potential of this network architecture and participate in these open radio access network standards-setting processes.

OBJECTIVES AND ACTIVITIES:

Under this statement of objectives, USAID and INVEST seek a firm or consortium to support research efforts that will help develop a business case for implementing virtualized network architectures in developing countries. The activity will also establish contacts between companies operating in this ecosystem, standards-setting bodies (O-RAN Alliance, Telecom Infra Project), investors, and developing country governments in order to make connections, raise capital, and demonstrate viability of this network approach in developing countries.

This assistance would include:

- Compilation of a set of tools and materials designed to educate developing country decision-makers and potential investors on the value of open, virtualized network architecture, including the development impact;
- Materials and trainings that translate and distill the complexity of virtualized network architecture into clear, concise, easily understandable products, so as to introduce USAID Mission staff and other relevant stakeholders to the role this technology can play in development;
- Facilitation of the inclusion of developing country stakeholder ‘voices’ in the O-RAN Alliance and Telecom Infra Project standards process, by establishing contacts with U.S. companies operating in this ecosystem, investors, and developing country engineers and decision-makers; and
- Sharing tools and recommendations through virtual workshops.

This program will support and supplement the Administration’s National Strategy to Secure 5G, in addition to supporting the USAID Digital Strategy’s Cybersecurity workstream.

DELIVERABLES & IMPLEMENTATION TIMEFRAME:

The following deliverables and timeframe are illustrative, and the partner should propose appropriate targets based on the technical approach to complete the objectives of this activity.

Illustrative deliverables include:

- Comprehensive list of U.S. stakeholders involved with the virtualized network architectures ecosystem in developing countries, including a summary of work being completed;
- A list of pertinent stakeholders involved in virtualized network architectures for each USAID region (Africa, Asia, Europe and Eurasia, Latin America and the Caribbean, and the Middle East);
- Tools and materials that provide concise, easily understandable information on the value of open, virtualized network architecture, including the development impact, customized for multiple audience needs (ranging from developing country policymakers to potential investors);
- Materials that translate and distill the complexity of virtualized network architecture into clear, concise, easily understandable products, so as to introduce USAID Mission staff and other relevant stakeholders to the role this technology can play in development;
- Report outlining the support provided to key stakeholders working in developing countries to become more involved in the O-RAN Alliance and Telecom Infra Project standards process;
- Virtual 'brownbag' presentations (5) on developed tools, materials, lessons learned and recommendations for Missions in each of the listed USAID regions above; and
- Summary report of activities completed, and lessons learned.

General Implementation Structure:

Onboarding and Work-Planning

- The Subcontractor, USAID CDD, and DAI INVEST teams will meet for an implementation kickoff meeting. The purpose and goal of this meeting is to align expectations and contexts and plan for the activities listed above.
- Partner Onboarding: DAI will work closely with USAID CDD to provide the selected partner(s) with all necessary context, as well as to develop the work plan(s) which may include specific target countries.

Implementation

- Project Implementation: The selected partner(s) will implement the work as prescribed by the work plan. DAI INVEST will provide management support and technical oversight throughout all activities and anticipates working closely with the subcontractor(s) and maintaining ongoing communications through periodic (e.g. weekly and monthly) check-ins/reporting as well as possible onsite meetings. USAID staff will be engaged throughout implementation, supporting the initial identification of challenges and root causes, and providing guidance and feedback as appropriate throughout the activity.

The activities outlined above are estimated to take place over a roughly 24-32 week period starting around October 2020. A deliverables table with an illustrative timeline is offered below; however, offerors may propose alternate timelines, workplan and level of effort associated with the various components of the activity.

Description	Illustrative Timeframe
Onboarding & Work Planning	2 Weeks
Comprehensive list of U.S. stakeholders involved with the virtualized network architecture ecosystem in developing countries	3-4 Weeks
USAID review and feedback of deliverable	2 Weeks
Develop tools and materials to help educate developing country decision-makers and potential investors on the value of open, virtualized network architecture	2-4 Weeks
Develop materials that introduce USAID Missions and other relevant stakeholders to the role of virtualized networks in development	2 Weeks
USAID review and feedback of deliverable	2 Weeks
Report outlining the support provided to key stakeholders working in developing countries involvement in the O-RAN Alliance and Telecom Infra Project standards process	4-6 Weeks
Present on developed tools and recommendations through in-country workshops and events parallel to standards-setting conferences and meetings, if possible	3-5 Weeks
Virtual presentations (5) on developed tools, materials, lessons learned and recommendations for USAID Missions	2 Weeks
Develop final report of lessons learned	2-3 Weeks

Contract Type:

DAI anticipates awarding a Firm Fixed Price contract type.

FIRM QUALIFICATIONS

- Activity lead with a higher education in economics, business, law, engineering, computer science, public policy or related field;
- Activity lead with 5-10 years telecommunications industry experience, including familiarity with mobile broadband, virtualized or open network architectures, and wireless network deployment;
- Access to and experience working with investors, technology providers, and regulators on telecommunications and ICT, particularly in the wireless industry;
- Demonstrated experience in conducting research and compiling comprehensive reports;
- Familiarity and experience with developing country contexts strongly preferred; and
- Excellent written and communication skills.