

USAID INVEST Project 1440 G street NW, 9<sup>th</sup> Floor Washington, DC 20005 INVEST\_Procurement@dai.com

**To:** Offerors

**Date:** June 5, 2019

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

Global LLC

**Subject:** Request for Proposals (RFP) INVEST-021 Mobilizing Private Investment for

Development: USAID Haiti PPP Engineering Technical Advisory Services to the

Government of Haiti

**DUE:** 1:00PM EDT on **June 14, 2019** 

## 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 to be funded by USAID under the USAID Haiti Buy-in Contract for technical advisory services to the Government of Haiti in the implementation of a Public-Private Partnership ("PPP") for the operation and management of the Caracol Power Utility and two regional grids (Petit-Goave and Les Cayes) via a long-term concession agreement.

Please note that due to conflict of interest considerations, the firm (or any of their affiliates) that provides the Engineering Advisory Services under this subcontract will be precluded from bidding on future RFPs from the Government of Haiti that implement the privatization of the regional grids on which the firm advised. The firm and its affiliates would not be precluded from bidding on future work related to regional grids that are not addressed by this subcontract.

- **I. RFP Process and deadlines:** This solicitation is anticipated to result in a Time and Materials (T&M) type contract. We anticipate issuing a single subcontract award resulting from the implementation of this agreement.
  - a. Submission of Questions Questions must be submitted no later than 1:00 pm EDT on June 7, 2019 via email at INVEST\_Procurement@dai.com.
  - b. Submission of Proposals Proposals must be submitted no later than 1:00 pm EDT on June 14, 2019 via email at INVEST\_Procurement@dai.com, copying katherine\_tilahun@dai.com and talin\_baghdadlian@dai.com. The subject line of the email should be your organization name, followed by "Submission under RFP INVEST-021: USAID Haiti" 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 the following submission documents. The Technical Proposal (CVs for proposed staff and four examples of past performance) and Cost Proposal should be prepared as separate files for independent evaluation, as follows below. Technical proposals should be submitted as a PDF. Past performance submissions shall not exceed 2 pages each and there is no page limit to the CVs submitted for consideration. Submissions in PDF are required. Please provide a copy of your cost proposal in Excel format.

# Part 1 – Technical Proposal

The technical proposal is composed of the following two (2) elements:

- 1. **Proposed Staffing** Offerors will furnish the CVs for the proposed staff members which they will assign to the activity, highlighting in yellow any relevant experience in Haiti and advisory services on similar concession agreements. It is anticipated that the technical advisory services will be a minimum of two individuals based on the wide range of required experience in varying energy sectors and aspects.
  - Qualifications
    - o Fluent in French and full professional capacity for drafting French technical documents
    - o Past credentials in similar assignments involving solar generation
    - o Past credentials in similar assignments involving dual fuel generation
    - o Past credentials in similar assignments involving LNG
    - o Past credentials in similar assignments involving "integrated grids" and distribution to end-users
    - o Degree in electrical engineering or similar
- 2. **Institutional Capacity** Offerors should provide details about the experience, expertise, or capacity of their firm to provide the services as described. This should also include past performance information for Haiti and/or similar jurisdictions. Four (4) case study examples or qualifications statements of past performance relevant to this activity (limited to two (2) pages per case study)

A cover page is acceptable for each proposal, should offerors choose to include one. No additional annexes or documentation beyond the requirements listed above are requested at this time.

## Part 2 – Cost Proposal

The contract type for the presumptive subcontract will be Time and Materials, awarded as a subcontract by DAI Global, LLC. It is anticipated that the number of days required to complete this work shall not exceed 120 days total, regardless the number of consultants. Two trips to Haiti are anticipated, as well as one team meeting in Washington, D.C. Offerors should estimate two weeks per trip for budgeting purposes; the length of each trip will be finalized during implementation.

Offerors should include a cost breakdown of the hourly rates for proposed personnel, with a build-up to their total proposed price or include substantiating price reasonableness documentation/justification. Offerors are expected to use their own cost/budget template(s); please limit file submissions to 10 megabytes or less.

III. 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 will provide the greatest overall benefit to USAID in response to the requirements stated in this RFP. DAI may also exclude an offeror from consideration if it determines that an Offeror is "not responsible," i.e., that it does not have the management and financial capabilities required to perform the work required. Proposals will be evaluated against a stated number of factors, including the proposed staffing, institutional

capacity, specific qualifications in the identified sectors and other evidence substantiating the bidder's ability to deliver, and budget and time frame considerations. Specific preference will be shown for firms that demonstrate relevant experience in Haiti and advisory services on similar concession agreements.

- **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.
  - **a. Proposed Staffing (70 points) -** Points for this section will be awarded based on the CVs submitted for proposed staff. The offeror will be scored based on its identification of staff who meet the required qualifications and have performed similar roles in Haiti or other similar environments.
  - **b. Institutional Capacity** (**30 points**) Points for this section will be based on information presented in case studies. Preference will be given to firms that have past performance in timely and successful delivery of similar services and/or relevant experience in Haiti and/or similar jurisdictions.
- 2. Cost Proposal: Cost will be evaluated separately from the technical approach, with due consideration for price reasonableness and allowability consistent with US government cost principles. Evaluation for this section will be dependent upon all information presented by the Offeror, including supporting cost information, as well as its alignment with the proposed staffing.
- IV. 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

# The INVEST Project: Mobilizing Private Investment for Development Statement of Objectives for USAID Haiti PPP, Engineering Advisory Services to the Government of Haiti (Caracol, Les Cayes & Petit-Goave Grids)

## Introduction

Through INVEST, the United States Agency for International Development ("USAID") seeks to unlock the potential of private capital to drive inclusive growth in countries around the world. Increasingly, private investors and businesses are looking to emerging markets for better returns and new market opportunities. Encouraging investment in these markets in high-impact areas important to USAID such as agriculture, financial services, infrastructure, energy, clean water, health, and education, however, requires new forms of collaboration between USAID and the investment community.

INVEST deploys USAID resources globally, including grants, guarantees, technical expertise, networks, and convening power, to enhance access to viable investment opportunities, lower transaction costs, and mitigate investment risk. INVEST also provides access to a network of individuals and firms with the specialized expertise across industries and geographies needed to identify, develop, and execute on investments for development impact. 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.

INVEST is a flexible, rapid buy-in mechanism that allows USAID missions and operating units to quickly and efficiently access the specialized expertise required across industries and geographies to identify, develop, and execute on blended finance solutions. INVEST bolsters the ability of USAID missions and operating units to attract and leverage local and international capital to address development challenges at scale. This strategic engagement with private capital fosters a shift towards enterprise-led development that enhances the efficiency and sustainability of USAID programs.

In this spirit, the Government of Haiti is looking to implement a Public Private Partnership ("PPP") for the electrical grids of Caracol, Les Cayes, and Petit-Goave via long-term concession agreements. As the Power Purchase Agreement (PPA) Contracts of these two regional grids have expired, the Government of Haiti (GoH) determined that these two grids should be privatized alongside the North-East regional grid effort that is already under way. For this reason, ANARSE, Haiti's energy regulator, lodged its request for transaction support with USAID/Haiti, who have requested INVEST provide it.

# **Implementation Objectives**

The Engineering Advisor(s) shall work directly with ANARSE and the broader GoH; the DAI INVEST Team assigned to the Transactions and USAID. The primary objective behind this support will be to assist the GoH in their efforts to, in an open, transparent, and competitive manner, privatize the ongoing operations, maintenance, management and potential expansion of Caracol, Les Cayes, and Petit-Goave regional grids, while protecting the interests of current consumers for reliable, affordable electricity supply. The ultimate arrangement for the operations and management may take the form of a PPP or other structured partnership arrangement. The challenges of investment and operations in Haiti will require that the engineering expert(s) be experienced in the technical aspects of multiple energy sectors (thermal, solar, hydro, etc.) in order to advise these power concessions in Haiti and have a record of advisory support to power plants in Haiti and similar environments.

The expected work performed by the Engineering Advisor(s) will include the following:

- Assist the GoH, in coordination with the Transaction Financial and Legal Advisors and in consultation with USAID, in the drafting of the technical aspects of the tender documentation, enumerated below, to implement the Transactions.
- Advise the GoH with respect to technical feasibility issues.
- Provide technical inputs to support the financial modeling exercises to ensure project viability.
- Review received proposals as a member of the evaluation committee including technical assessment of the bidders' past performance and experience managing integrated utilities with distribution assets, and building solar energy and LNG inputs.

# **Activity Structure**

## Phase I Activities – Tender Process and Transaction Implementation

The Engineering Advisor(s) will review and provide feedback on the technical aspects of the tender documentation, which are in French. It is envisaged that Phase I activities will include:

- Working in close cooperation with the Transaction Legal Advisor and in consultation with USAID, prepare the tender documents for the GoH;
- Retain a local legal counsel to ensure tender and concession documentation is compliant with Haitian law.
- Draft the concession agreement with input from USAID, the GoH and the Transaction Advisor and review all associated documentation prepared by the GoH to ensure that it is compliant with the Concession Agreement. In addition, the Transaction Legal Advisor will ensure that the GoH's documentation is aligned with the international practice and local Haitian law prior to delivering the documentation;
- Review and assist the GoH in the drafting of a Request for Proposals ("RFP") that will include (i) general information for preparing and submitting proposals (including the minimum period for the preparation of the proposal, conditions to access the Data Room, procedures and timeframe for questions and answers and clarification sessions), (ii) Project specifications, and (iii) Terms of reference and bid evaluation criteria for the offers;
- With the Transaction Financial Advisor, support the concessioner during the interest firms/bidders' information conference to answer questions about the draft tender documents; and
- With the Transaction Financial Advisor, recommend revisions that should be included in the final tender documents and, if necessary, make the revisions.

## Deliverables:

• Technical review and inputs into the draft concession agreement and request for proposals.

# <u>Phase II Activities – Bidding Process and Closing</u>

- In coordination with the Transaction Financial Advisor and the Transaction Legal Advisor, the Engineering Advisor(s) will assist the GoH in preparing and arranging a bidders' conference;
- Support the GoH in responding to bidders' requests for clarifications on the RFP;
- Share market experience with respect to how to address clarifications or request for amendments from the bidders;
- Assist in the evaluation of bids include the review and evaluation of both technical and financial proposals;

## Deliverables:

- Technical review and inputs for responses to the requests for clarification and/or amendments;
- Technical review and inputs on the evaluation of bidders.

# **General Implementation Structure**

Onboarding and Work-Planning

• Transaction Legal Advisory Services Provider Onboarding: DAI will work closely with USAID staff and associated stakeholders to provide the selected partner(s) with all necessary context.

# Implementation and Evaluation

- Project Implementation: The selected Engineering Advisor(s) will implement the work as prescribed by the work plan(s) in cooperation with the Transaction Financial and Transaction Legal Advisors. DAI will provide management support and ensure periodic (e.g. monthly and quarterly) check-ins/reporting. The DAI team and USAID shall be copied on all correspondence with the GoH.
- Ongoing Evaluation: DAI will define indicators in subcontract and collect and review M&E data from Advisors for requisite reporting to USAID. DAI will conduct data quality assessments as necessary.

Please note that due to conflict of interest considerations, the firm (or any of their affiliates) that provides the Engineering Advisory Services under this subcontract will be precluded from bidding on future RFPs from the Government of Haiti that implement the privatization of the regional grids on which the firm advised. The firm and its affiliates would not be precluded from bidding on future work related to regional grids that are not addressed by this subcontract.

## **General Implementation Timeframe**

This activity is intended to last for approximately 6 months with variable labor intensity needs depending on key milestones and phase of the Transaction. The Engineering Advisor(s) should anticipate two incountry visits and one Washington, DC-based team meeting. All trips are estimated to be two weeks in length.

Activity	Timeframe
Onboarding & Workplanning	1 week
Implementation and Evaluation	6 months

## **Contract Type and Budget Ceiling**

As noted above, although the technical advisory services will primarily be provided to the GoH, they will be funded by INVEST.

DAI contemplates a total maximum budget for this assignment of USD 250,000 including all expenses and taxes. Competitive offerors will propose an approach that will credibly manage technical needs to deliver all required inputs while not exceeding this total ceiling, and highly competitive proposals will propose discounts from this budget ceiling. In the event that an Offeror submits a bid in excess of the indicative maximum fee, it shall justify this choice and demonstrate that the indicative price is insufficient to provide the required assistance in order reach financial closing of the Transaction.

The final contract will be a Time and Materials type subcontract and it is expected that the Offeror selected will complete all advisory services in support of the Transaction within the time frame contemplated by the parties.



USAID INVEST Project 1440 G street NW, 9<sup>th</sup> Floor Washington, DC 20005 INVEST\_Procurement@dai.com

**To:** Offerors

**Date:** June 10, 2019

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

Global LLC

**Subject:** Request for Proposals (RFP) INVEST-021 Mobilizing Private Investment for

Development: USAID Haiti PPP Engineering Technical Advisory Services to the

Government of Haiti (Modification 01)

**DUE:** 1:00PM EDT on **June 19, 2019** 

## 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 to be funded by USAID under the USAID Haiti Buy-in Contract for technical advisory services to the Government of Haiti in the implementation of a Public-Private Partnership ("PPP") for the operation and management of the Caracol Power Utility and two regional grids (Petit-Goave and Les Cayes) via a long-term concession agreement.

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  - b. Submission of Proposals Proposals must be submitted no later than 1:00 pm EDT on June 19, 2019 via email at INVEST\_Procurement@dai.com, copying katherine tilahun@dai.com and talin\_baghdadlian@dai.com. The subject line of the email should be your organization name, followed by "Submission under RFP INVEST-021: USAID Haiti" 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 the following submission documents. The Technical Proposal (CVs for proposed staff and four examples of past performance) and Cost Proposal should be prepared as separate files for independent evaluation, as follows below. Technical proposals should be submitted as a PDF. Past performance submissions shall not exceed 2 pages each and there is no page limit to the CVs submitted for consideration. Submissions in PDF are required. Please provide a copy of your cost proposal in Excel format.

# Part 1 – Technical Proposal

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## Part 2 – Cost Proposal

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capacity, specific qualifications in the identified sectors and other evidence substantiating the bidder's ability to deliver, and budget and time frame considerations. Specific preference will be shown for firms that demonstrate relevant experience in Haiti and advisory services on similar concession agreements.

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Thank you,

DAI INVEST Procurement and Partnerships Team

INVEST Procurement@dai.com

# The INVEST Project: Mobilizing Private Investment for Development Statement of Objectives for USAID Haiti PPP, Engineering Advisory Services to the Government of Haiti (Caracol, Les Cayes & Petit-Goave Grids) Modification 01

# Introduction

Through INVEST, the United States Agency for International Development ("USAID") seeks to unlock the potential of private capital to drive inclusive growth in countries around the world. Increasingly, private investors and businesses are looking to emerging markets for better returns and new market opportunities. Encouraging investment in these markets in high-impact areas important to USAID such as agriculture, financial services, infrastructure, energy, clean water, health, and education, however, requires new forms of collaboration between USAID and the investment community.

INVEST deploys USAID resources globally, including grants, guarantees, technical expertise, networks, and convening power, to enhance access to viable investment opportunities, lower transaction costs, and mitigate investment risk. INVEST also provides access to a network of individuals and firms with the specialized expertise across industries and geographies needed to identify, develop, and execute on investments for development impact. 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.

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# **Implementation Objectives**

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The expected work performed by the Engineering Advisor(s) will include the following:

- Assist the GoH, in coordination with the Transaction Financial and Legal Advisors and in consultation with USAID, in the drafting of the technical aspects of the tender documentation, enumerated below, to implement the Transactions.
- Advise the GoH with respect to technical feasibility issues.
- Provide technical inputs to support the financial modeling exercises to ensure project viability.
- Review received proposals as a member of the evaluation committee including technical assessment of the bidders' past performance and experience managing integrated utilities with distribution assets, and building solar energy and LNG inputs.

# **Activity Structure**

## Phase I Activities – Tender Process and Transaction Implementation

The Engineering Advisor(s) will review and provide feedback on the technical aspects of the tender documentation, which are in French. It is envisaged that Phase I activities will include:

- Working in close cooperation with the Transaction Legal Advisor and in consultation with USAID, prepare the tender documents for the GoH;
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- Draft the concession agreement with input from USAID, the GoH and the Transaction Advisor and review all associated documentation prepared by the GoH to ensure that it is compliant with the Concession Agreement. In addition, the Transaction Legal Advisor will ensure that the GoH's documentation is aligned with the international practice and local Haitian law prior to delivering the documentation;
- Review and assist the GoH in the drafting of a Request for Proposals ("RFP") that will include (i) general information for preparing and submitting proposals (including the minimum period for the preparation of the proposal, conditions to access the Data Room, procedures and timeframe for questions and answers and clarification sessions), (ii) Project specifications, and (iii) Terms of reference and bid evaluation criteria for the offers;
- With the Transaction Financial Advisor, support the concessioner during the interest firms/bidders' information conference to answer questions about the draft tender documents; and
- With the Transaction Financial Advisor, recommend revisions that should be included in the final tender documents and, if necessary, make the revisions.

## Deliverables:

• Technical review and inputs into the draft concession agreement and request for proposals.

# Phase II Activities – Bidding Process and Closing

- In coordination with the Transaction Financial Advisor and the Transaction Legal Advisor, the Engineering Advisor(s) will assist the GoH in preparing and arranging a bidders' conference;
- Support the GoH in responding to bidders' requests for clarifications on the RFP;
- Share market experience with respect to how to address clarifications or request for amendments from the bidders;
- Assist in the evaluation of bids include the review and evaluation of both technical and financial proposals;

## Deliverables:

- Technical review and inputs for responses to the requests for clarification and/or amendments;
- Technical review and inputs on the evaluation of bidders.

# **General Implementation Structure**

Onboarding and Work-Planning

• Transaction Legal Advisory Services Provider Onboarding: DAI will work closely with USAID staff and associated stakeholders to provide the selected partner(s) with all necessary context.

# Implementation and Evaluation

- Project Implementation: The selected Engineering Advisor(s) will implement the work as prescribed by the work plan(s) in cooperation with the Transaction Financial and Transaction Legal Advisors. DAI will provide management support and ensure periodic (e.g. monthly and quarterly) check-ins/reporting. The DAI team and USAID shall be copied on all correspondence with the GoH.
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Please note that due to conflict of interest considerations, the firm (or any of their affiliates) that provides the Engineering Advisory Services under this subcontract will be precluded from bidding on future RFPs from the Government of Haiti that implement the privatization of the regional grids on which the firm advised. The firm and its affiliates would not be precluded from bidding on future work related to regional grids that are not addressed by this subcontract.

## **General Implementation Timeframe**

This activity is intended to last for approximately 6 months with variable labor intensity needs depending on key milestones and phase of the Transaction. The Engineering Advisor(s) should anticipate two incountry visits and one Washington, DC-based team meeting. All trips are estimated to be two weeks in length.

Activity	Timeframe
Onboarding & Workplanning	1 week
Implementation and Evaluation	6 months

## **Contract Type and Budget Ceiling**

As noted above, although the technical advisory services will primarily be provided to the GoH, they will be funded by INVEST.

DAI contemplates a total maximum budget for this assignment of USD 250,000 including all expenses and taxes. Competitive offerors will propose an approach that will credibly manage technical needs to deliver all required inputs while not exceeding this total ceiling, and highly competitive proposals will propose discounts from this budget ceiling. In the event that an Offeror submits a bid in excess of the indicative maximum fee, it shall justify this choice and demonstrate that the indicative price is insufficient to provide the required assistance in order reach financial closing of the Transaction.

The final contract will be a Time and Materials type subcontract and it is expected that the Offeror selected will complete all advisory services in support of the Transaction within the time frame contemplated by the parties.