

Micro Small and Medium Enterprise Umbrella Programme

Component: MSME Financing & Development (SIDBI)

PN: 09.2459.7-001.00



giz Deutsche Gesellschaft
für Internationale
Zusammenarbeit (GIZ) GmbH



REQUEST FOR PROPOSAL FOR CURRICULUM DEVELOPMENT, CONDUCTING 50 WORKSHOPS ON MSME ENERGY EFFICIENCY FINANCE TRAINING WORKSHOPS FOR BANKERS, PROCESS AND OUTCOME DOCUMENTATION AND PRINTING OF 1000 COPIES OF SUMMARY REPORT

Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH,
GIZ Office, B 5/1, First Floor, Safdarjung Enclave
New Delhi 110029, India

TITLE OF THE ASSIGNMENT	CURRICULUM DEVELOPMENT, CONDUCTING 50 WORKSHOPS ON MSME ENERGY EFFICIENCY FINANCE TRAINING WORKSHOPS FOR BANKERS, PROCESS AND OUTCOME DOCUMENTATION AND PRINTING OF 1000 COPIES OF SUMMARY REPORT
TENDER NUMBER	
CONTRACT PERIOD	December 2012 – December 2013
DATE OF ISSUE	29 th October 2012
CLOSING DATE	19 th November 2012

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Section 1 — Letter of Invitation

From:

Procurement Manager
German Development Cooperation
Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH,
GIZ Office, B 5/1, First Floor, Safdarjung Enclave
New Delhi 110029, India

To:

All Prospective Bidders

Dear Sir/Madam,

1. Small Industries Development Bank of India (SIDBI)-Implementing Agency appointed by Govt. of India and Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH are implementing the “MSME Financing & Development” component of the “MSME Umbrella Programme for MSME Promotion”.
2. GIZ Invites bid from reputed and experienced consultancy firms for providing the following consulting services:
“CURRICULUM DEVELOPMENT, CONDUCTING 50 TRAINING WORKSHOPS ON MSME ENERGY EFFICIENCY FINANCE FOR BANKERS, PROCESS AND OUTCOME DOCUMENTATION AND PRINTING 1000 COPIES OF SUMMARY REPORT”
3. This RFP is available to all eligible prospective consulting firms.
4. A firm will be selected under **Single Stage- two envelop bid on Quality-cum-Cost Based Selection (QCBS)** Method and procedures described in this RFP, in accordance with the policies of GIZ.
5. The RFP includes following documents:
Section 1 - Letter of Invitation
Section 2 - Instructions to Consultants (local)
Section 3 - Terms of Reference
Section 4 - Technical Proposal - Standard Formats
Section 5 - Financial Proposal – Standard Formats
6. GIZ reserves the rights to cancel / modify this tender without assigning any reasons.

Yours sincerely,

Section 2 — Instructions to Consultants

The Consultants are invited to submit a Technical Proposal and a Financial Proposal, as specified in the Data Sheet, for consulting services required for this assignment. The Proposal will be the basis for contract negotiations and ultimately for a signed Contract with the selected Consultant. Consultants are expected to familiarize themselves with conditions and take them into account in preparing their Proposals.

1. Address, and formal requirements

Bids are to be sent to-

Procurement Manager

GIZ Office India

B 5/1, First Floor, Safdarjung Enclave,

New Delhi 110 029

Tel: +91-11-

Deadline for submission of bids: 4:00 pm, 19th November 2012

The bids are to be sent in double envelopes. The inner envelope must be sealed and bear the following inscription:

Envelope 1

"Financial Proposal for Consulting Services for Curriculum Development, Conducting 50 Training Workshops in MSME Energy Efficiency Finance for Bankers, Process and outcome documentation and printing of 1000 copies of the Summary Report"

PN: 09.2459.7-001.00

Envelope 2

"Technical Proposal for Consulting Services for Curriculum Development, Conducting 50 Training Workshops in MSME Energy Efficiency Finance for Bankers, Process and outcome documentation and printing of 1000 copies of the Summary Report"

PN: 09.2459.7-001.00

The Outer envelope containing these two envelopes should be marked:

"Consulting Services for Curriculum Development, Conducting 50 Training Workshops in MSME Energy Efficiency Finance for Bankers, Process and outcome documentation and printing of 1000 copies of the Summary Report"

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Not to be opened before (20th November 2012)

All copies of the bid must be submitted by courier/post/hand in letter form. The technical and financial proposal will also be presented in electronic format – on a CD duly labeled as such. The above formal requirements regarding envelopes and marking also apply to further copies of the bid.

1. The Technical Proposal

It should include detailed working concept which allows us to examine the technical aspects in the light of the project objective (only in case, a detailed concept is not already given by GIZ). Also, if applicable, special tasks requested within the scope of the terms of reference (TOR). Technical proposals should be submitted in the following format using standard forms as outlined in **Section 4**.

- 1) Executive Summary
- 2) Profile
- 3) Relevant Experience
- 4) Technical Response
- 5) Description of the Team
- 6) Matters not appropriate in any other section

There should be no price information anywhere in the technical proposal document. Failure to comply will result in disqualification of the bid.

2. The Financial Proposal

Price quotation is to be submitted in a separate envelope together with your technical proposal and should be prepared using the Standard Formats as outlined in **Section 5**. It shall list all costs associated with the assignment, including (a) remuneration for staff, and (b) reimbursable

expenses indicated in the Data Sheet. If appropriate, these costs should be broken down by activity.

3. Cost of preparing the bid

No remuneration will be granted for the preparation of the bid and the documents to be attached thereto. The bids, together with the attached documents, shall become the property of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, without entitlement to remuneration. A request that the first-ranked bidder present candidate staff members previous to the awarding of the contract does not constitute grounds for a claim for reimbursement of related costs from the GIZ.

4. Material and Equipments

Details on the materials and equipment needed, generally to be procured by the GIZ; the TORs for planned subcontracts, other measures as well as training planned for partner experts or staffs in the framework of preparation for the assignment are also to be provided, if needed.

5. Formation of consortium

Should you form a joint venture group or consortium, the bid must specify the members of this group/consortium and lead partner. Furthermore, the authorised representatives of the members are to be named. Furthermore, the members must declare that they are jointly and severally liable for the performance of the contract. The formation of joint ventures with a company, also invited by GIZ to submit a bid (in a two stage bid process), requires the prior written consent of GIZ.

6. Modification/withdrawal of the bid

Adjustments to or withdrawal of bids are to be communicated in writing by post by the deadline for submission of bids. Subsequent adjustments or modifications to the bid, which can be submitted up to the deadline for submission of bids, shall also be subject to the requirements for sending in the bid. The front of the envelope is to be clearly marked as...

"Adjustment to Financial Proposal or Technical Proposal for Consulting Services for Curriculum Development, Conducting 50 Training Workshops in MSME Energy Efficiency Finance for Bankers, Process and outcome documentation and printing of 1000 copies of the Summary Report"

PN: 09.2459.7-001.00

(as the case maybe)

7. Other requirements

Agreements with third parties in restraint of competition, which are to the disadvantage of the GIZ, are not permissible and will lead to the bid not being considered.

The documents submitted in response to the request to bid shall be treated confidentially by yourself and may only be made available to third parties in connection with potential subcontractors in relation to your bid. Non-compliance may result in the bid not being considered.

8. Data Sheet

1.1	Name of the Client: Deutsche Gesellschaft für Internationale Zusammenarbeit / German International Cooperation (GIZ) Method of selection: Single stage- two envelop ; Quality-cum-Cost Based Selection Method (QCBS)
1.2	Financial Proposal to be submitted together with Technical Proposal: Yes Name of the assignment is: Consulting Services for Curriculum Development, Conducting 50 Training Workshops in MSME Energy Efficiency Finance for Bankers, Process and outcome documentation and printing of 1000 copies of the Summary Report
1.3	Proposals must remain valid 60 days after the submission date, i.e. until: 18th January, 2013
2.1	All Clarifications required by bidders with reference to this RFP may be sent to the e-mail id gtzproc@giz.de latest by 2nd November 2012 . All such queries will be compiled and a consolidated reply will be uploaded on tendernews website by 5th November, 2012 .
3.1	Proposals shall be submitted in the following language: English
3.2	Consultants may associate with other Consultants: Yes
3.2	The estimated number of calendar-months required for the assignment is around 13

	months from the date of contract signing
3.3	Training is a specific component of this assignment: No
3.4	<p>Applicable Reimbursable Expenses</p> <p>(1)a per diem allowance in respect of Personnel of the Consultant for every day in which the Personnel shall be absent from the home office for purposes of the Services</p> <p>(2)cost of necessary travel, including transportation of the Personnel by the most appropriate means of transport and the most direct practicable route</p> <p>(3) cost of investigations and surveys in field locations</p> <p>(4)cost of applicable international or local communications such as the use of telephone and facsimile required for the purpose of the Services</p> <p>(5) cost of printing and dispatching of the reports to be produced for the Services</p>
3.5	<p>Amounts payable by the Client to the Consultant under the contract to be subject to local taxation: Yes</p> <p>Service tax will be applicable as per prevailing tax law in India. As per Indian Tax Law, tax at source has to be deducted on payments to consultants, if such payments exceed Indian Rupees 30,000 p.a.</p>
4.1	<p>Consultant must submit the original and 2 copies of the Technical Proposal, and the original of the Financial Proposal</p> <p>Electronic copies of the Technical and Financial Proposal in MS Word must also be submitted on a separate CD along with the hard copy proposals</p>
4.2	<p>The Proposal submission address is:</p> <p>Procurement Manager, GIZ, B-5/1 (1st floor), Safdarjung Enclave, New Delhi 110 029</p> <p>Proposals must be submitted no later than the following date and time: 4:00 pm on 19th November 2012</p>

5.1 (a)	<p>The number of points to be assigned to each of the staff positions or disciplines shall be determined considering the following sub-criteria and relevant percentage weights:</p> <ul style="list-style-type: none"> 1) Experience of the company 20% 2) Appropriateness of suggested concept and work plan 20% 3) Technical backstopping 10% 4) Qualification of local staff 50% <p>Total weight: 100%</p> <p>Please refer annex I for detailed technical assessment grid of the offer</p>
5.1(b)	<p>The minimum technical score required to be called for Technical Presentation is: 50% (i.e. 500 points out of total 1000)</p>
5.2	<p>Financial quotes to be provided in INR</p>
5.3	<p>The weights given to the Technical and Financial Proposals are: Technical = <u>0.7</u> and Financial = <u>0.3</u></p>
6.1	<p>Expected date for commencement of consulting services: 1st December 2012</p>

Section 3:

Terms of Reference

for

MSME Energy Efficiency Finance Training Workshops for Bankers

1. Background

Government of India implements the Micro, Small and Medium Enterprise Financing and Development Project in cooperation with WB, DFID, KfW and GIZ. Implementing Agency is the Small Industries Development Bank of India (SIDBI), as Project Executing Agency. The overall objective of the multi-donor project is “increased turnover and employment in Micro, Small and Medium enterprises in India”. TC implemented by GIZ under the Project covered the period from 01/04/2006 to 30/06/2010 (1st Phase). The overall objective of GIZ’s Technical Cooperation under the Project is to provide MSMEs better access to qualitatively appropriate financial and non-financial enterprise oriented services.

GIZ implements two TC components under the Project. The first TC component, Business Development Services (BDS), promotes development of strategies and implementation of market based generic, embedded and public business development services (BDS) to value chain/clusters MSMEs in selected Project regions. The financial sector component of the Technical Assistance of GIZ offers training and advisory services to participating banks/institutions/MFIs aimed at increasing credit and other financial services to regional clusters/value chains of MSMEs. After carrying out due diligence and study on the need and potential by reputed agencies, GIZ selected four regions (viz. NCR, Hyderabad, Indore and Dehradun) of the country for implementation of the project in 10 identified MSME clusters. It selected seven partner banks/institutions for facilitating the implementation. Activities included among others: i) Training of partner bank staff on CRM and on selected sectors; ii) cooperation with selected MFIs on up scaling activities; iii) linking banks and clients through cooperation with financial consultants; iv) support to the credit guarantee scheme of CGTMSE; v) support in developing a credit score card.

In its second phase, the project will be one out of two components of an “MSME Umbrella Programme”, which has started in July 2010 and will last for four years. The objective of the umbrella programme will be “MSMEs will benefit from an improved investment climate and services environment”; the objective of the MSME F&D component will be

“Improved access to financial and non-financial services, that are innovative and tailored to suit market needs”

This goal is about to be reached through measures in the areas of financial and non-financial services, as well as improving upon an enabling policy environment.

2. Context

With the rapid increase in the growth of the Indian economy, there is a concomitant increase in energy demand and consumption. The rates of expansion as well as the current practices in energy consumption are clearly not sustainable in the long run given the excessive reliance of energy generation through non renewable sources. As a consequence, policy debates on energy efficiency improvements in India are inextricably linked to the discussions on energy security for the future in India. It is also being realized that energy efficiency improvements contribute to the improvements in the profitability of businesses and also enhance their competitiveness.

Energy efficiency in the Micro, Small and Medium Enterprises (MSME) assumes importance because of the prevailing high costs of energy and supply related concerns. In general this sector lacks in accessing technology due to poor consultancy support/services for technological information and institutional barriers like:

- Non availability of skilled man power
- Lack of awareness among entrepreneurs,
- Emphasis on production and production cost
- Lack of managerial skills
- And poor adoptability of changing technology.

Energy conservation addresses competitiveness, energy security, environment and supply related issues in one go. A large number of MSMEs like foundries, brass, textiles, refractories, brick, ceramics, glass, etc located in clusters in various states of the country, have large potential for energy savings.

3. Present Proposal

As part of the project, GIZ has been undertaking a number of activities to facilitate MSME improved access to appropriate financial and non-financial products and services. One of the areas, identified for cooperation with our partner banks is development of nationally transferable innovative financial products, models, instruments and services.

GIZ has contracted Frankfurt School of Finance & Management to map knowledge on international experience, analyze international good practices and come up with conclusions and recommendations, share their research results with SIDBI and our partner banks- State Bank of India and Bank of India in a workshop. Frankfurt School has since shared their research with our partner banks and also prepared concept note and draft model loan product/scheme for energy efficiency finance for MSMEs which have been presented to SIDBI and our partner banks. State Bank is already piloting the loan product /scheme in two MSME industrial clusters – light engineering cluster at Ludhiana and steel re-rolling mills cluster at Mandi Gobindgarh in Punjab.

In our efforts to promote responsible business behavior and ‘Green Finance’ in MSME sector, it is proposed to assist SIDBI and our partner banks - State Bank of India and Bank of India in development of loan products for energy efficiency finance for MSMEs in India based on internationally successful innovative loan products/models as also to strengthen the capacities of staff of SIDBI, our partner banks and other banks in the areas of energy efficiency and environment protection measures by training their MSME Relationship Managers, Credit Manager, Trainers and other staff.

It is proposed to organize one day training workshops for bankers on Energy Efficiency Finance at 50 MSME industrial Clusters across the country as under:

1. Ahmedabad-Gujarat (Dyes & Chemicals, Textiles);
2. Alwar-Rajasthan (Oil Mills);
3. Aurangabad- Maharashtra (Auto Components)
4. Bangalore-Karnataka (Machine Tools);
5. Batala-Punjab (Foundry);
6. Belgaun-Karnataka (Foundry);
7. Bhubaneswar-Orissa (Brassware);
8. Chennai-Tamil Nadu (Glassware);
9. Coimbatore-Tamil Nadu (Foundry);
10. East & West Godavari-Andhra Pradesh (Refractories);
11. Faridabad- Haryana (Light Engineering)
12. Ganjam-Orissa (Rice Milling);

13. Gurgaon-Haryana (Auto Components);
14. Hawrah- West Bengal (Galvanizing & Wire Drawings);
15. Jagadhari-Haryana (Brass & Aluminum)
16. Jalandhar-Punjab (Foundry)
17. Jamnagar-Gujarat (Brassware);
18. Jodhpur-Rajasthan (Lime Kilns);
19. Jorhat-Assam (Tea);
20. Karnal- Haryana (Rice Milling);
21. Kochi-Kerala (Sea Food Processing);
22. Ludhiana-Punjab (Light Engineering);
23. Mandi Gobindgarh-Punjab (Steel Re-rolling Mills);
24. Morbi-Gujarat (Ceramics);
25. Surat-Gujarat (Textiles);
26. Tirupur- Tamil Nadu (Textiles)
27. Varanasi- U.P. (Brick Kilns);
28. Vapi-Gujarat (Chemicals, Pulp & Paper Mills);
29. Vellore- Tamil Nadu (Rice Mills);
30. Warangal-Andhra Pradesh (Rice Milling)

(List of remaining 20 MSME clusters to be finalized by us in consultation with our partner banks SBI and BOI)

The Consulting Company/Firm will be required to develop the necessary training module, conduct the training workshops, submit report on each workshop, process and outcome documentation of this initiative and prepare and have printed 1000 copies of the Summary Report for circulation to different stake holders.

GIZ will fund development of training module, documentation of the initiative, printing of Summary Report. The first 10 workshops will be fully funded by GIZ, the next 10 workshops 75% and further 10 workshops 50% of the cost of the workshops and for funding of the remaining 20 workshops the Consultants will have to mobilise resources from the other stake holders such as Govt. Depts., banks, institutions etc, in order to give long term sustainability to the initiative.

4. Scope of Services and Deliverables

The Consulting Company/Firm will be required to develop the necessary Training Module and Information Kit in energy efficiency finance for bankers and conduct one day training workshops at 50 MSME clusters as above, submit report on each workshop, process and outcome documentation of this initiative and prepare and have printed 1000 copies of the Summary Report for circulation to different stake holders.

The training module would cover general awareness about the various Govt./other stake holders' schemes and services for promoting energy efficiency in MSME sector, technical knowhow and skill required and necessary tools/kit for implementation of schemes, incentives, loan products, various international and national lines of credit for promoting energy efficiency finance in MSME sector, assessment tools, impact measurement and monitoring tools etc.

The curriculum may broad include

- Information on Public Support Schemes and Programmes of Ministry of MSME(MoMSME), Bureau of Energy Efficiency(BEE), different ministries and other public institutions such as PCRA, NPC etc. for promoting technology up-gradation and energy efficiency in MSME sector;
- Information on different schemes of State Govts./their promoted agencies for technology up-gradation and energy saving to be included in the curriculum of the workshops to be held in the MSME clusters in the respective states.
- Various Environmental and Energy Efficiency lines of credit granted by international agencies such as World Bank, KfW, JICA, AFD to SIDBI for promotion of energy efficiency finance and cleaner production in MSMEs;
- Various financial products for promotion of technology up-gradation and energy efficiency of commercial banks such Project Uptech of State Bank of India, EEP Scheme of Bank of Baroda, CEEP and ESCO projects of IDBI Bank, EE&EC Scheme of IREDA etc.;
- International best practices in energy efficiency finance as per the findings and conclusions in the Study Report of Frankfurt School of Finance & Management. Concept paper and draft loan product/scheme developed by Frankfurt School;
- State Bank of India's loan product/scheme being piloted in Ludhiana and Mandi Gobindgarh Clusters;

- Assessment/appraisal of proposals for energy efficiency finance, measurement and monitoring tools for impact assessment developed under international lines of credit (KfW, JICA).

The training module will be finalized in discussions with GIZ and SIDBI-PMD officials. The Consultants will seek active involvement of the local branches of SIDBI, State Bank of India, Bank of India and other banks at the centre of the training workshops. Cluster specific inputs, if any, may be included in the curriculum.

The Consultants will put the learnings from these workshops in the form of a Summary Report which will be printed as a booklet and circulated among the various stake holders and the policy makers. The Summary Report will cover:

- An overview of various Govt./other stake holders' schemes and services for promoting energy efficiency in MSME sector, technical knowhow and skill required and necessary tools/kit for implementation of schemes, incentives, loan products, various international and national lines of credit for promoting energy efficiency finance in MSME sector, assessment tools, impact measurement and monitoring tools etc
- The objectives of this initiative;
- Coverage of the workshops – across geographical regions and industrial clusters, participants etc.;
- Findings and Learnings from this initiative, challenges and issues highlighted by the participants;
- Suggestions and recommendations for the stakeholders and the policy makers;

Deliverables

1. Development of Training Module and Information Kit on MSME Energy Efficiency Finance for Bankers broadly in line with topics indicated above and in discussion with GIZ and SIDBI-PMD officials and make a presentation of the Training Module developed to GIZ, SIDBI-PMD, SBI, BOI and BEE officials;
2. Conduct one day Training Workshops for MSME Relationship Managers, Credit Managers, Trainers and other staff of banks at the above 50 MSME Clusters, in energy efficiency finance, as per the Training Module developed. Each workshop should have minimum 40 participants;

3. After completion of each training workshop, the consultants to submit to GIZ and SIDBI-PMD, a brief report on the workshop including the feedback received from the participants and the suggestions for improvement in the quality of the future workshops after each workshop, if any;
4. To put the learnings from these workshops in the form of a Summary Report which will be printed as a booklet and circulated among the various stake holders and the policy makers. Summary Report to be finalized in consultation with GIZ and SIDBI-PMD;
5. The booklet to be around 35-40pages. The Consultants will prepare the art work and design of the booklet including cover page in consultation with GIZ and have 1000 copies of the booklet printed in colour (4-5 colours). The booklet will have logos of GIZ, SIDBI, SBI, BOI and the consultants;
6. The consultants will develop database of around 800 stake holders and policy makers in consultation with GIZ and courier the booklets to them

5. Deliverables and Time Schedule (November 2012 to November 2013)

The overall time period for this assignment is expected to be around 13 calendar months starting November 2012. All deliverables shall be submitted in hard copy with 1 copy in colour print and 3 copies in black and white. An electronic copy of each deliverable shall also be provided on a CD. The expected timelines for each deliverable are as under:

- | | |
|--------------------------------------|------------|
| • Development of Training Module | 31.12.2012 |
| • Conducting first 25 Workshops | 30.04.2013 |
| • Completion of all 50 workshops | 31.10.2013 |
| • 1000 printed copies of the booklet | 31.12.2013 |

Feedback will be communicated to the consultant on submission of each deliverable.

Wherever necessary, consultant shall make appropriate changes to improve the deliverables.

6. Payment Terms

- First Payment(advance payment) - 30% of the total fee within 15 days of the confirmation of the proposal;
- Second Payment - 30% of the total fee within 15 days of completion of first 25 workshops;

- Third Payment - 30% of the total fee within 15 days of completion of all the 50 workshops; and
- Final Payment - 10% of the total fee within 15 days of printing, delivery and dispatch of 1000 printed copies of Summary Report.

7. Eligibility criteria and Expertise /skill sets required:

- It is envisaged that the required consulting services are carried out by an Indian/international consulting firm experienced in the field of energy efficiency and energy efficiency finance education solutions with necessary understanding of Indian MSME sector with a standing of more than 10 years;
- We assume that the assignment will be carried out by:
 - A well qualified international or Indian expert as team leader with experience of more than 10 years in the field of energy efficiency and good understanding of MSME sector in India - who will be required to lead all key discussions with GIZ and SIDBI-PMD;
 - Pool of 3-4 Indian and/or international experts with experience of more than 5 years in the field of financial education in energy efficiency and necessary understanding of MSME sector in India and good communication skills;
 -
- Documentation experience of team members and expertise in similar projects/assignments
- Sound understanding of MSME sectors and support mechanism in India
- Strong analytical skills, good report writing and communications skills;
- The team leader and other members of the team must be proficient in English and Hindi and should be able conduct workshops in English and Hindi.

Other terms & condition

Periodical review meetings will be held with GTZ and SIDBI-PMD officials, at New Delhi.

The final report on the services rendered has to be sent at latest within 10 calendar days after the conclusion date of the contract to the Principal Adviser, MSME Financing and Development Project, B-5/1 Safdarjung Enclave, Third Floor, New Delhi - 110 029.

Service Tax on the professional fees will be applicable as per the tax law in India, which is at present 12.36%. According to the Indian Tax Law, tax at source has to be deducted for every payment to consultants if the amount paid to the consultant exceeds Rs.30, 000/- per year.

Section 4: Technical Proposal – Standard Formats

With reference to brief guideline provided in section 2 of this RFP, consultants are expected to use the following recommended formats and number of pages for their technical proposals.

1. Executive Summary :

Executive summary should capture important parts of your technical proposal including approach, timeline, milestones and staffing. Executive summary must be confined to maximum 5 pages.

2. Profile

2 page description of background, organisation and competencies of the consulting firms and each associate for this assignment

3. Relevant Experience

This section should contain project credentials of the bidder. This section should mention 5 most relevant experiences and must not exceed 10 pages.

FORMAT FOR RELEVANT EXPERIENCE

Name of Assignment	Client (Including Contact Detail of person in charge)	Start/ End dates	Value (INR/Euro)	Role of the firm/short description
Selected Relevant projects-National				
Selected Relevant projects-Global				

4. Qualification to Terms of reference :

This section is intended to record understanding of the assignment and interpretation of the TOR and any observations/suggestions the bidder may have on the terms of reference. Facilities and support required/expected from counterpart should also be mentioned. Maximum number of pages to be used is 3.

5. Technical response :

This section should define the approach, methodology, work plan including sub activities and deliverables and how the bidder intends to organise the project team to execute the engagement. Technical response must confine to 30 pages and in following 3 sub sections.

1) Approach and methodology

Detailing out planned approach and methodology for carrying out the assignment to achieve the expected output

2) Work Plan including sub activities and Deliverables

Detailing out Main activities, sub activities, duration, their interrelations, Milestones and linked deliverables. Work plan should be consistence with approach and methodology and should break out the TOR in feasible working plan.

3) Project Organisation

This should contain the project team organogram and brief profiles of project team personnel. Details of which tasks your home office will be undertaking within the scope of the project (backstopping) and the designation of a contact person at the Head Office who is responsible for the project, with his or her CV included. Earliest possible date for commencing the work, with alternatives where appropriate

6. Description of the proposed team

1) Staffing

This section should contain the staffing table which indicates the name, firm, area of expertise, designation and task assigned to the professional staff as per the following format.

FORMAT FOR STAFF TASK ASSIGNMENTS

Name of Staff	Firm	Area of Expertise	Position Assigned	Task Assigned

2) Schedule

Staffing schedule (giving alternatives if necessary) with details of the personnel to be engaged in the home/field work with their person-days of involvement in the assignment as per the following format.

FORMAT FOR STAFFING SCHEDULE

No.	Name of Staff	Description	Staff input (In number of Days)					Total Staff input (days)		
			Month 1	Month 2	Month 3	Month 4	Month n	Home	Field	Total
		Home (days)								
		Field (days)								

Staffing schedule should be specifically broken into Professional staff (International and Indian) and Support Staff.

3) Curricula vitae (CVs)

The CVs of the experts designated for the project are to be in tabular form and should cover the points given in the format. Each CV must confine to maximum 3 pages in the following format.

FORMAT FOR CVs FOR PROPOSED PROFESSIONAL STAFF

Name:	
Nationality:	
Designation:	
Proposed Position:	
Whether Employee of the Firm:	
Years with the Firm:	

Key Qualifications:	
Education:	
Recent Relevant Experience:	<Project Title> <Designation in Project Team> <Description of Role>

Record of Employment:		
From	To	Designation & Name of Firm

Languages Known:			
	Read	Write	Speak

4) Personnel Inputs and work plan

This section should contain a GANNT chart mapping project phases, activities and sub activities, milestones and deliverables and person-days involvement of each project team member. There should be no price information in this table, only estimates of person-days of each consulting team member.

S. No.	Work-plan Activities	Team Member	Showing the completion of activities and involvement (maydays) of team member in respective cells				Remarks , If any
			Wk 1	Wk 2	Wk 3	Wk n	

7. Matters not appropriate in any other section

Section 5: Financial Proposal: Standard Formats

Financial Proposal should be submitted with a covering letter clearly mentioning the validity of the quote for minimum 60 days and as per the following format.

FORM 1: TOTAL COST SUMMARY

Description	Cost in INR
Professional Fee	
Reimbursable Fee	
Applicable Tax	
Total Cost	

FORM 2: FORMAT FOR STAFF INPUTS AND FEE RATES

Name	Description	No. Of Days	Daily Fee Rate in INR	Total Fee (No. Days x Fee)
Sub Total				
Tax				

Total				
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FORM 3: FORMAT FOR PROJECTED REIMBURSABLE COST

Description	Number	Rate	Cost(INR)
Vehicle hire			
Airfare			
Accommodation			
Per diem for staff			
Others(please specify)			
Total			

FORM 4: COST BREAK UP ACCORDING TO THE MAJOR DELIVERABLE

Deliverables (As Outlined In TOR)	Consulting Fee	Reimbursable Fee	Total Amount in INR

Annex I: Technical Evaluation Grid

Technical Assessment Grid of Offers (AURA)

Section	MSME Financing & Development(SIDBI)	Project Short Title	MSME Umbrella Programme						Date	25.10.2012		
AV	Manfred Haebig								PN	PN:09.2459.7-001.00		
Assessor									VN	VN		
Version	Individual assessment/Overall assessment											
			Company 1		Company 2		Company 3		Company 4		Company 5	
(1) Criteria	(2) Weighting in %	(3) points (max.10)	(4) assessment (2)x(3)	(3) points (max.10)	(4) assessment (2)x(3)	(3) points (max.10)	(4) assessment (2)x(3)	(3) points (max.10)	(4) assessment (2)x(3)	(3) points (max.10)	(4) assessment (2)x(3)	
1. Experience of the Company												
1.1	Technical Experience (experience of state relevant sectors											
	10 years of experience in Bankers' training and capacity building	10										
	Experience of working with national/international level Business associations/BMOs	2										
	Experience of conducting energy efficiency training/education at grassroots' level – directly with entrepreneurs of micro and small businesses	4										
1.2	Regional Experience (state country/region)											
	India/SIDBI – DFID – GIZ Clusters in MSME training and capacity building activities	4										
Total 1			20									
2. Appropriateness of suggested concept and work plan (Will be evaluated after technical presentation)												
2.1	Concept (technical approach/methodical procedure)											
	- interpretation of objectives	4										
	- terms of reference	4										
	- implementation methodologies	6										
2.2	Work schedule and time schedule	2										
2.3	Alternative concepts	4										

Total 2	20									
3. Technical backstopping / Knowledge Management										
3.1 Staff and backstopping conception	5									
3.2 Knowledge and information management	5									
Total 3	10									
4. Consideration of local resources										
5. Qualification of proposed staff										
5.1 Expert 1: Team Leader/lead trainer										
5.1.1 General qualification										
Business Advisory, Moderation and training and consultation experience	2									
Energy efficiency trainings, more than 10 yrs of experience	3									
5.1.2 Specific qualification										
- special field										
MSME promotion & development and energy efficiency - trainings, workshops for MSMEs, associations, bankers and other stakeholders etc	6									
- management experience	2									
- ability to work in a team	2									
5.1.3 Regional experience / Knowledge of country										
India – MSME Clusters	3									
5.1.4 Language skills										
Hindi and English	2									
Subtotal 5.1	20									
5.2 Pool of Experts 4: Trainers										
5.2.1 General qualification										
Change Management approach	2									
- professional experience of 5 years in direct trainings of MSMEs	2									
5.2.2 Specific qualification										
- special field										
Qualification and experience in MSME sector in India	9									
- ability to work in a team										
5.2.3 Regional experience / Knowledge of country										
India	5									

5.2.4	Language skills										
	Hindi and English	2									
	Subtotal 5.2	20									
5.3	Composition of the team	10									
	Total 5.	50									
	Grand Total	100	100								
	Assessment in %										
	place										
6.	Special advantages / risks (see extra page)										
	place										