



Date: 16 November 2022
Reference: RFP 2022/036

Request for proposals RFP 2022/036

Consultancy services for Establishing a renewed and shared data vision, recalibrated GCF data strategy and high-level roadmap

1. Background

- 1.1 The Green Climate Fund (the “GCF”, or the “Fund”) was established with the purpose of making a significant and ambitious contribution to the global efforts towards attaining the goals set by the international community to combat climate change. In the context of sustainable development, the Fund will promote a paradigm shift towards low-emission and climate-resilient development pathways by providing support to developing countries to limit or reduce their greenhouse gas emissions and to adapt to the impacts of climate change. The Fund’s headquarters are located in Songdo, Incheon City, Republic of Korea.
- 1.2 The GCF was designated as an operating entity of the financial mechanism of the United Nations Framework Convention on Climate Change (“UNFCCC”). It is governed and supervised by a Board that has responsibility for funding decisions pursuant to the Governing Instrument for the Green Climate Fund (the “Governing Instrument”). It is supported by an independent Secretariat, accountable to the Board, having management capabilities to execute day-to-day operations of the GCF, providing administrative, legal and financial expertise.

2. Invitation

- 2.1 Through this request for proposals (“RFP”), the GCF is seeking to contract a qualified, reputable and experienced Firm to provide consultancy services for Establishing a renewed and shared data vision, recalibrated GCF data strategy and high-level roadmap. The terms of reference included in Annex 1 provides the details of the assignment and expected deliverables.
- 2.2 Proposals must be submitted to the GCF no later than **Wednesday December 28, 2022 at 1700 hrs (time)** Korean time.
- 2.3 The RFP includes the following annexes:

Annex 1	Terms of Reference
Annex 2	Requirement for Firm’s Proposals
Annex 3	Evaluation Criteria
Annex 4	Company Profile Form
Annex 5	Acknowledgement Letter
Annex 6	Timeline
Annex 7	Model Contract
- 2.4 The terms set forth in this RFP, including all the annexes listed above, will form part of any contract, should the GCF accept your proposal. Any such contract will require compliance with all factual statements and representations made in the proposal, subject to any modifications agreed to by the GCF in the context of any negotiations entered into it.



- 2.5 The GCF may, at its discretion, cancel the requirement in part or in whole. It also reserves the right to accept or reject any proposal and to annul the selection process and reject all proposals at any time prior to selection, without thereby incurring any liability to proposers/firms.
- 2.1 Proposers may withdraw their proposal after submission provided that written notice of withdrawal is received by the GCF prior to the deadline prescribed for submission of proposals. No proposal may be modified subsequent to the deadline for submission of proposals. No proposal may be withdrawn in the interval between the deadline for submission of proposals and the expiration of the period of proposal validity.
- 2.2 All proposals shall remain valid and open for acceptance for a period of 90 calendar days after the deadline for submission of proposals. A proposal valid for a shorter period may be rejected. In exceptional circumstances, the GCF may solicit the proposer's consent to an extension of the period of validity. The request and the responses thereto shall be made in writing.
- 2.3 Effective with the release of this solicitation, all communications relating to this RFP must be directed only to the Head of Procurement by email at procurement@gcfund.org and bnodeda@gcfund.org. Proposers must not communicate with any other personnel of the GCF regarding this RFP.
- 2.4 This RFP is issued under the GCF Administrative Guidelines on Procurement.

3. Joint Venture, Consortium or Association

- 3.1 If the Proposer is a group of legal entities that will form or have formed a joint venture, consortium or association at the time of the submission of the Proposal, they shall confirm in their Proposal that:
 - a) they have designated one party to act as a lead entity, duly vested with authority to legally bind the members of the joint venture jointly and severally,
 - b) if they are awarded the contract, the contract shall be entered into, by and between GCF and the designated lead entity, who shall be acting for and on behalf of all the member entities comprising the joint venture.
- 3.2 After the Proposal has been submitted to GCF, the lead entity identified to represent the joint venture shall not be altered without the prior written consent of the GCF. Furthermore, neither the lead entity nor the member entities of the joint venture can submit another proposal:
 - a) either in its own capacity; nor
 - b) as a lead entity or a member entity for another joint venture submitting another Proposal.
- 3.3 The description of the organization of the joint venture/consortium/association must clearly define the expected role of each of the entity in the joint venture in delivering the requirements of the RFP, both in the Proposal and the Joint Venture Agreement. All entities that comprise the joint venture shall be subject to the eligibility and qualification assessment by GCF.
- 3.4 Where a joint venture is presenting its track record and experience in a similar undertaking as those required in the RFP, it should present such information in the following manner:
 - a) Those that were undertaken together by the joint venture; and
 - b) Those that were undertaken by the individual entities of the joint venture expected to be involved in the performance of the services defined in the RFP.



- 3.5 Previous contracts completed by individual experts working privately but who are permanently or were temporarily associated with any of the member firms cannot be claimed as the experience of the joint venture or those of its members, but should only be claimed by the individual experts themselves in their presentation of their individual credentials.
- 3.6 If a joint venture's Proposal is determined by the GCF as the most responsive Proposal that offers the best value for money, the GCF shall award the contract to the joint venture, in the name of its designated lead entity. The lead entity shall sign the contract for and on behalf of all other member entities.

4. Request for Clarification of RFP Documents

- 4.1 A prospective proposer requiring any clarification of the solicitation documents may notify the GCF in writing to the email address procurement@gcfund.org and cc bndeda@gcfund.org by the specified date and time mentioned in Annex 6. The subject line of the email **MUST** have the reference number and title of the RFP i.e. **RFP 2022/036 – [title]**. The GCF will respond in writing to any request for clarification of the solicitation documents that it receives by the due date published in Annex 6. Written copies of the GCF response which contain information that may be of common interest to all bidders (including an explanation of the query but without identifying the source of inquiry) will be posted on the GCF website and/or communicated via email.

5. Amendments to RFP Documents

- 5.1 At any time prior to the deadline for submission of proposals, the GCF may, for any reason, whether at its own initiative or in response to a clarification requested by a prospective proposer, modify the RFP documents by amendment. The amendments will also be posted on the GCF website and/or communicated via email.
- 5.2 In order to allow prospective proposers reasonable time in which to take the amendment into account in preparing their proposals, the GCF may, at its sole discretion, extend the deadline for the submission of proposal.

6. Language of Proposals

- 6.1 The proposals prepared by the proposer and all correspondence and documents relating to the proposal exchanged by the proposer and the GCF, shall be written in English. Supporting documents and printed literature furnished by the proposer may be in another language provided they are accompanied by an appropriate translation of all relevant passages in English. In any such case, for interpretation of the proposal, the translation shall prevail. The sole responsibility for translation and the accuracy thereof shall be the responsibility of the proposer.



7. Submission of Proposals

- 7.1 **Format and form of submission of bids:** Bidders are requested to send a Bid preferably¹ through the GCF Supplier portal at <https://gcf.supplier.ariba.com> (a supplier manual can be found on the GCF website <https://www.greenclimate.fund/who-we-are/procurement> as an attachment under this RFP) **or** via email to procurement@gcfund.org and copied to bnveda@gcfund.org

i) Submission through the Supplier Portal (SAP Ariba)

1. Open <https://gcf.supplier.ariba.com/>
2. Click Register Now
3. Fill in Company Information, Fill in User account information and details under ‘Tell us more about your business’
4. Check ‘I have read and agree to the Terms of Use and ‘I have read and agree to the SAP Ariba Privacy Statement’ then click ‘Register’
5. Check your email and click the activation link.
6. Fill in additional information required, click Save and Close.
7. Your company information will be submitted to GCF and will be reviewed and approved. Once you register, please send an email to procurement@gcfund.org with the RFP number and title as the email reference and confirm that you are interested in submitting a bid. You will then be invited to participate in the RFP. You will receive the RFP event notification email from the Green Climate Fund with a link to access the RFP. This link can be used only once. If you require to access the portal after you have activated the link, you can log in on <https://gcf.supplier.ariba.com> with your user name and password.
8. Review Prerequisites and Click ‘I accept the terms of this agreement’
9. Open the Technical Section of the RFP section and download the RFP document and technical proposal submission forms
10. Open the Financial Section of the RFP and download the financial bid submission forms
11. When ready to submit your bid, upload the technical bid under the TECHNICAL section and the financial bid under the FINANCIAL section. Please **DO NOT** enter or upload any financial information under the TECHNICAL section as this may result in disqualification.
12. Click ‘Submit Entire Response’ to submit bid.

(For detailed instructions on how to access and submit a bid, see the supplier manual. It is recommended that bidders register on the portal as early as possible.)

ii) Submission via email

Two separate files (technical and financial bids) should be attached to the email as below.

The Technical file should contain the technical proposal and be named as follows:

RFP 2022 036 – TECHNICAL PROPOSAL - (name of proposer)

Please **DO NOT** include any financial information in the technical proposal as this may result in disqualification.

The financial file should contain the financial proposal and be named as follows:

RFP 2022 036 – FINANCIAL PROPOSAL - (name of proposer)

The subject line of the email should be as follows:

¹ Suppliers shall note that GCF will be phasing out e-mail submission in the near future, therefore suppliers are encouraged to register and submit their Bid/Proposal through the GCF Supplier portal (SAP Ariba)



RFP 2022/036 – Consultancy Services for Establishing a renewed and shared data vision, recalibrated GCF data strategy and high-level roadmap (name of proposer)

7.2 The Financial Proposal **MUST** be password protected. The authorized procurement officer will contact the bidders that pass the qualifying technical score for the password to open the Financial Proposal. Bidders should **NOT** send the password to the financial proposal until they are requested to do so by the procurement officer. Financial Proposals that are submitted without password protection may be rejected for non-compliance.

7.3 All prospective proposers are kindly requested to return the completed Acknowledgement Letter of RFP receipt (Appendix 5) by the date indicated in Appendix 6, duly signed by an authorized representative, via email, advising whether they intend to submit a proposal by the designated closing date/time. Please also notify the Procurement Specialist immediately if any part of this RFP is missing and/or illegible.

8. Late proposals

8.1 Any proposals received by the GCF after the deadline for submission of proposals prescribed in Annex 6 of this document shall normally be rejected.

9. Opening of Technical Proposals

9.1 Technical Proposals will be opened on the date indicated in Annex 6. The purpose of this public opening is to record the names of proposers having submitted proposals by the due date and time. Only technical proposals will be opened at the public opening. The financial proposals will not be opened. Proposers submitting proposals are welcome to send one (1) representative, with proper authorization from their company, to observe the opening and recording of proposals received.

10. Opening of Financial Proposals

10.1 GCF shall notify in writing those Proposers that have achieved the minimum qualifying technical score and request for the password for the Financial Proposals.

11. Corrupt, Fraudulent, Coercive, Collusive and other Prohibited Practices.

11.1 The GCF requires that all GCF staff, proposers/bidders, suppliers, service providers and any other person or entity involved in GCF-related activities observe the highest standard of ethics during the procurement and execution of all contracts. The GCF may reject any proposal put forward by proposers, or where applicable, terminate their contract, if it is determined that they have engaged in corrupt, fraudulent, coercive, collusive or other prohibited practices.

12. Conflict of Interest

12.1 In their proposal, proposers must (i) confirm that, based on their current best knowledge, there are no real or potential conflicts of interest involved in rendering Services for the GCF, and (ii) set out their policy on dealing with conflicts of interest should these arise.

13. Confidentiality

13.1 Information relating to the evaluation of Bids and recommendations of Contract award will not be disclosed to Bidders. Upon notification of award, an unsuccessful Bidder may, within 7(seven) days request feedback on the grounds on which its bid/proposal was not selected, by addressing a written request to the Procurement Manager. GCF shall respond in writing, and in accordance with the relevant procurement rules.



Annex 1 Terms of Reference

ESTABLISHING A RENEWED AND SHARED DATA VISION, RECALIBRATED GCF DATA STRATEGY AND HIGH-LEVEL ROADMAP

A. Background

The Green Climate Fund (“GCF”) is one of the leading organizations in the global climate change financing space. It is a multilateral Fund created by the United Nations Framework Convention on Climate Change (UNFCCC). The mandate and vision of the organization is ambitious regarding promoting paradigm shifting low-emission and climate-resilient development pathways for developing countries, in addition to assisting them with the implementation of the 2015 Paris Agreement and the UNFCCC within the evolving climate finance landscape. This includes, inter alia, (i) channelling new, additional, adequate, and predictable financial resources to developing countries and catalysing climate finance, both public and private, at the international and national levels; and (ii) strengthening the global response to the threat of climate change, in the context of sustainable development and efforts to eradicate poverty.

The GCF has a single office, headquartered in the Republic of Korea, currently with around 225 staff (growing to 350), and to deliver its mission works through a ‘second level’ business model where it collaborates closely with programming partners (called ‘Accredited Entities’ and ‘Delivery Partners’) to deliver the programming priorities of developing countries. As a relatively young organization with just over 10 years in the climate financing space, GCF has been rapidly expanding its programming portfolio, with the organization being on track to programme by the end of 2022, over USD\$11 billion in climate investments, with over 80% of the portfolio under implementation. The vision, strategic objectives and priorities of the GCF are primarily guided by its Strategic Plan (currently being updated) and the Board’s agenda. The GCF’s theory of change is based on the Fund being able to create value through (1) helping developing countries engage in integrated investment planning to identify high-impact climate change interventions, (2) accelerating innovation of new climate technologies, business models and practices, (3) scaling up and creating new markets, through catalyzing and de-risking wider source of finance for climate action, and (4) aligning finance with sustainable development through strengthening the capacity of national and regional financial systems to support climate action.

To allow the organization to execute its core functions – working with its partners to originate, programme and effectively manage its multi-billion-dollar investment portfolio - there is a complex web of internal and external stakeholders, automated and manual systems both upstream and downstream that are generating massive amount of data in different formats, databases, and systems. The Fund has recently invested significant resources in both codifying its internal processes, as well as digitalizing substantial parts of its operations. The Fund has adopted a Digital Agenda, is in the processing of rolling out a Data Management Strategy to improve data quality, analytics and governance, and is also engaged in other related initiatives including the development of Taxonomy and Data Factory. The progress to date covers work for the most part in the tactical and strategic blocks of the triangle illustrated in Figure 1 below. However, while GCF relies integrally on data to run its operations, it has not strategically or fully conceptualized how data could serve as a strategic asset in helping the Fund create value in the delivery of its mission, theory of change, strategic planning and better programming via learning loops; or examined how the totality of its digital/data initiatives align in support of such vision. To this end, the Secretariat wants to examine options for defining a shared data vision that operates in the ambient section of the triangle, including examining associated costs and benefits. To assist the Secretariat in this regard, it has therefore decided to seek the services of a highly experience and qualified consulting firm to establish a renewed and shared Data Vision, a recalibrated Data Strategy and a high-level Roadmap.

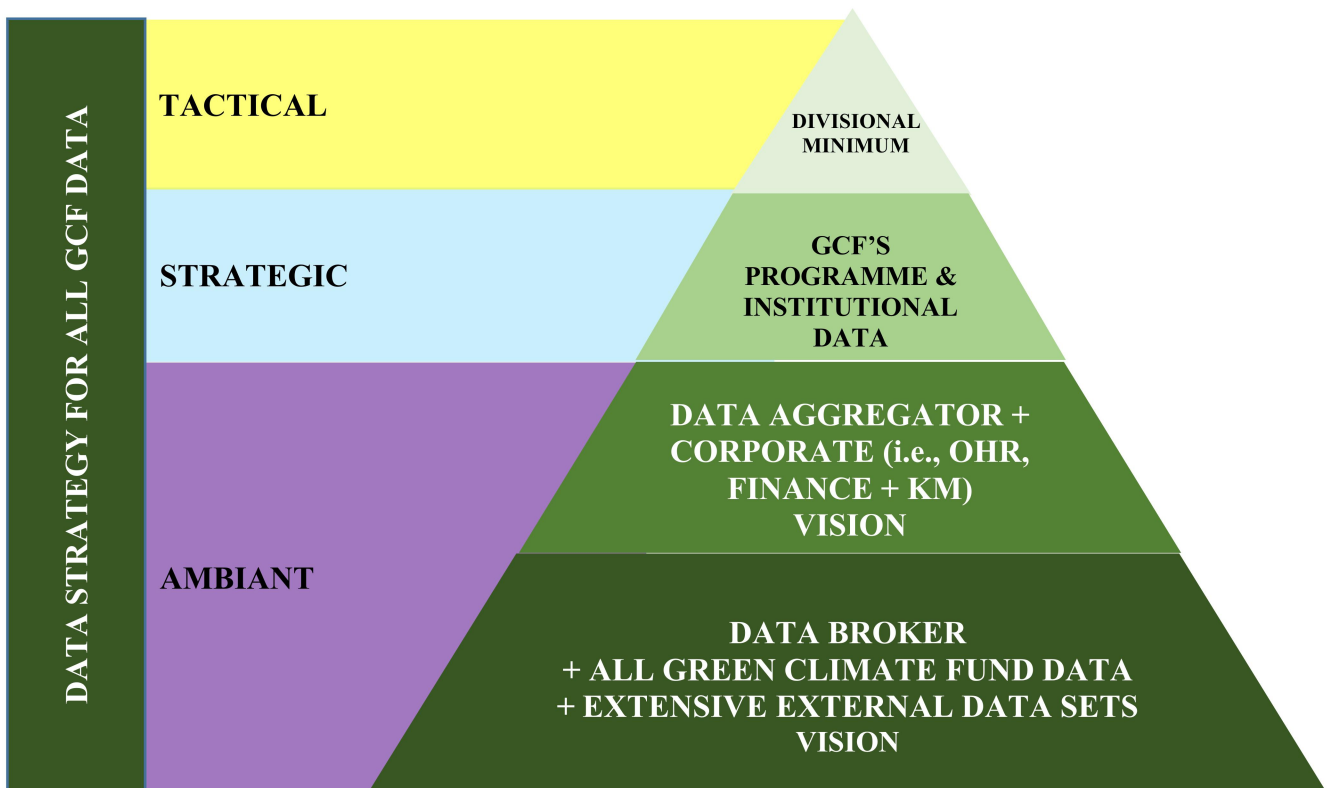


Figure 1

B. Objective of the assignment

The primary objective of this project is to help GCF develop a renewed and shared Data Vision that treats data as a strategic asset class and recalibrate its Data Strategy to operate at the ambient level with a clear pathway towards implementation of the Data Vision. The exercise will clearly define the extent of the data strategy journey required by the Fund to fulfil its Strategic Plan goals and be a leader in the climate change financing space.

The project will also critically analyze and stress test essential elements of the GCF's current data management landscape as part of the process for developing a revised high-level roadmap for achieving the renewed and shared Data Vision, in addition to highlighting remaining gaps at the tactical and strategic levels with recommended solutions.

More specifically the project will develop:

- a) A shared data vision that will orient GCF toward maximizing value creation from its data, drawing on the latest technology, data services and power of artificial intelligence
- b) A recalibrated data strategy focused on what is required to achieve the envisioned 'future state'
- c) An updated current state and capability analysis, examining the GCF's current data management landscape in light of the proposed vision/strategy, and identifying remaining gaps and opportunities, including with respect to synergies and integration;
- d) A recalibrated data governance structure to oversee and coordinate building out of the relevant capabilities for achieving the future state based on the renewed and shared data vision;



- e) A high-level Roadmap that would include recommendations and milestones on how the GCF can accelerate its progress to addressing gaps in the foundational stages of the data strategy journey and achieving its future state based on its data vision

C. Activities to be undertaken by the firm

The following activities may be conducted as means of reaching the desired objective in addition to any other recommended tasks deemed necessary:

1. Activity 1: Conduct a three-part activity including:

Part A: Review of Background Materials: Familiarization with the Fund's mandate, strategy, business model and current data management landscape, through a review of relevant background materials listed below;

- a) Governing Instrument, Strategic Plan and related programming strategies; Secretariat work programmes;
- b) GCF Digital Agenda 2020 – 2023;
- c) Data management strategy and roadmap and related documents (data health checks, data manual);
- d) Review of Secretariat capabilities to deliver the USP;
- e) Any other relevant governance and data policy documents as provided by the Client

Part B: Initial scoping of options with cost/benefits analysis and success criteria for pursuing a data vision operating at the ambient level, drawing on industry best practices (in particular in the area of finance/FinTech) to outline opportunities for GCF to enhance value through its data collection/processing/insight, as well as the associated commitments in terms of time and resourcing. This will be used for preliminary direction setting (Activity 2)

Part C: Defining Roles & Responsibilities: Consulting firm will provide a detailed Responsible, Accountable, Support, Consulted and Informed (RASCI) matrix clearly outlining roles, responsibilities and relationships between client, consulting firm and any third-party service provider

2. Activity 2: Preliminary direction-setting with Executive/Senior Management Team (SMT):

The consulting firm will engage the GCF Executive and SMT in a preliminary direction-setting exercise on the data vision, to equip them with information on the options and associated cost/benefit analysis. This engagement will seek to collectively formulate an initial proposition for the renewed and shared data vision and strategy, calibrating how ambitious GCF would like to be in its data vision in light of the corresponding commitments required. The consultant firm will also provide clear success criteria aligned with the GCF's SMT expectations for achieving the overall objective of the project.

3. Activity 3: Current state assessment and gap/opportunity analysis:

In collaboration with the GCF project team, reviewing the current data management landscape through the perspective of the preliminary data vision to assess the changes in the capabilities of GCF's systems, data hubs, integration, governance, resourcing and stakeholder management that would be needed to move toward the desired vision. Utilizing the current state assessment to identify remaining or new gaps/opportunities. Gap analysis should clearly outline solvable recommendations that are aligned with the current technology available in the marketplace.

- 4. Activity 4: Engagement with GCF’s Stakeholders:** In collaboration with the GCF’s project team, engaging relevant GCF internal and external stakeholders/partners to get an update on their perspective with regard to data needs and challenges and test other components of the analysis and recommendations;

- 5. Activity 5: Creation of Data Strategy setting out Future State requirements:** Develop a recalibrated data strategy aligned with the data vision and identify requirements and develop recommendations for moving toward the desired future state, informed by the current state assessment and gap/ opportunity analysis. The recalibrated data strategy should be practical, comprehensive, proprietary and specific to the context of the GCF and fit into the business strategy of the GCF (Strategic Plan). This will require testing and iterating the document with the core project team and SMT, and should include:
 - i. A clear articulation of the overall shared data vision;
 - ii. Recommendations aligned with solutions in the marketplace for addressing key gaps/opportunities to deliver this vision;
 - iii. Development of prioritized Use Cases by assessing the data assets inventory and conducting a Data SWOT to explore how could the value from data be generated including using learning loops to improve programming
 - iv. Justification for investment and an analysis for cost and impact of lost opportunities;
 - v. Recommendations on a revised governance structure to effectively oversee the implementation of the revised strategy and roadmap ensure continuous alignment between the business strategy, data strategy, and ICT Strategy.
 - vi. Where applicable, recommendations for complementary data technology(ies) and appropriate delivery mechanisms that augment high quality and high-fidelity data
 - vii. Recommendations on how to build a data-driven culture in GCF
 - viii. Recommendations for futuristic uses of data enabled by data science, artificial intelligence and descriptive/predictive analytics to find patterns in data to drive business decision-making and automate business processes

- 6. Activity 6: Roadmap and implementation:** Develop a roadmap for moving forward with specific activities, milestones, KPIs and timeline for tracking progress in executing the data strategy; and potentially provide follow-up advice on execution of the roadmap. Prospective consulting firms should note that the project will be a milestones outcome driven project, where payments are made only on the delivery of milestones.

D. Expected Deliverables

ITEM #	DELIVERABLES	ACTIVITIES	TIMELINES
1	Initial scoping report: - including rapid review of GCF context, initial scoping of options for a GCF data vision informed by cost/benefit analysis and success criteria, RASCI matrix with roles and responsibilities	1	Week 1-2
2	Preliminary data vision: - initial shared working proposition for data vision tested through engagement with Executive/SMT	2	Week 3-4
2	Gap Assessment Report: - including current state assessment and gap/opportunity analysis including solvable recommendations aligned with marketplace	3 - 4	Week 6
3	Recalibrated Data Strategy and high-level roadmap – initial draft	5 - 6	Week 8
4	Recalibrated Data Strategy and high-level roadmap – Final draft	5 - 6	Week 10
5	High-level data roadmap implementation advice and follow-up	6	may extend to 12 – 24 months after deliverable 5

E. Required Qualifications

i. Qualifications of the Firm

Experienced in data strategy, data management and digital transformation with over 15 years’ experience working with big technologist clients from fortune 100/500 companies in areas such as managing big data, complex and predictive AI analytics, data privacy, protocol and ethics, data governance solutions, data management and warehousing, business automation analytics, cloud, cloud migration services, enterprise data hubs, cloud-based change management, data architecture, visualization, machine learning and data science.

Prospective bidders should clearly demonstrate that they have the background, experience, and resources in terms of skillset, qualifications, and competencies to achieve each of the deliverables in the allocated timelines included in the Terms of Reference:

ii. Qualifications of the team

The Engagement team leader shall work closely with GCF's senior leadership and the rest of the GCF project team to understand GCF's objectives, conceptualizing the approach to meet these goals, and overseeing successful execution of the engagement. He/She would establish and maintain relationships with the key business and technology stakeholders with the ability to influence them at all organizational levels. He/She is expected to provide Strategic Leadership for creation and development of innovative and unique Data Strategy suited for GCF's vision and mission to solve some of the most challenging needs to create value from Data across the organization. He/She will



have a demonstrated capability in technology leadership for transformational data and digitalization initiatives. He/She should have expertise in areas such as: AI/ML, Cloud, Visualization, Data Architecture, Management, Governance, and design. He/She should have Excellent analytical, strategic, conceptual thinking, planning, and execution skills, Strong business acumen, including specific knowledge of non-profit climate finance industry. including the ability to explain technical concepts and technologies to business leaders, and business/science-based concepts to the IT workforce.

The representative members in the engagement team should provide coverage for entire Data Value chain with skills and competencies in the following technical, Business and Management domains:

- Data science and engineering,
- Data analysis
- Data Visualization
- Statistical analysis and computing
- Strategic Business Data Analysis and Business Intelligence
- Machine Learning
- Deep Learning
- Big Data
- Data Architecture and Modeling
- Data Management
- Data Governance
- Data Policy
- Data Quality
- Data Standards
- Data Operations
- Data Security
- Data Privacy
- Data Technologies For
 - Ingestion
 - Integration
 - Transformations
 - Storage
 - Quality
 - Operations
 - Analytics
- Familiarity with tools such as: XML, ETL frameworks, Hadoop, Apache Spark, Tableau, MS Power BI etc.
- Ability for critical thinking and creativity
- Excellent communication and presentation skills
- Systematic and logical approach to problem-solving
- Accuracy and attention to detail

Exact team size, team composition, functional role allocation would be flexible for the vendor to decide guided by the factors such as the methodology/approach, vendor's experience with other similar projects and ability of the vendor to leverage their existing knowledge base.



F. Project team, monitoring and progress controls, including reporting requirements

The firm will work closely with a core data strategy project team, led by OED with stakeholders from relevant Secretariat divisions/offices. It will report on a regular basis any progress or any issues that may hinder and/or prevent the achievement of the ToR deliverables and receive feedback until the final product is obtained. Consulting Firm will also include as part of the RASCI matrix any special requirements for change management and project management regarding the delivery of the project objectives.

Commitment to Quality:

The firm will demonstrate a strong commitment to quality throughout the engagement tenure by:

- Providing an acceptance criterion for each deliverable in the proposal
- Describing the quality assurance process for the deliverables with a reasonable number of quality gates in the process
- Documenting the delivery approach with references to the standards, procedures, templates and checklists that would be used.
- An indicative number of resource(s) – in FTEs - to be deployed during the engagement process for performing QA activities.

G. Contract Term, Duration and Estimated Time Input

1. **Location:** Remote
2. **Contract:** Short-Term
3. **Estimated dates:** February 10, 2023, to April 21, 2023
4. **Weeks:** 10
5. Project will be **milestones outcome driven project** with payment being made only on the delivery of milestones
6. **Option for follow up:** The consultancy will include an option for follow-up engagement through the [12-24] months following delivery of the data strategy and roadmap.

H. Travel

N/A



Annex 2

Requirements for Firms' Proposals Technical Proposal

The technical proposal will be submitted in a separate file and will address all aspects of the Terms of Reference. The Technical Proposal shall have all the necessary details in response to the Terms of Reference and the proposer shall fill in the technical Forms (TECH Forms) which follow in this annex and which must be filled in accordingly.



TECH Forms

Form TECH-1: Technical Proposal Submission Form

[Location, Date]

To: [Name and address of Client]

To whom it may concern:

We, the undersigned, offer to provide the consulting services for [Insert title of assignment] in accordance with your Request for Proposal dated [Insert Date] and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal, and a Financial.

We are submitting our Proposal in association with: [Insert a list with full name and address of each associated Consultant if submitting as an association]

We hereby declare that all the information and statements made in this Proposal are true and accept that any misinterpretation contained in it may lead to our disqualification.

If negotiations are held during the period of validity of the Proposal, i.e., before the date indicated in Paragraph Reference 2.7 of the RFP, we undertake to negotiate on the basis of the proposed staff, methodology and approach. Our Proposal is binding upon us and subject to the modifications resulting from Contract negotiations.

We undertake, if our Proposal is accepted, to initiate the consulting services related to the assignment.

We understand you are not bound to accept any Proposal you receive.

We remain,

Yours sincerely,

Authorized Signature [In full and initials]: _____

Name and Title of Signatory: ____

Name of Firm: .

Address: _____



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Form TECH-2: Firm's Organization and Experience

A - Organization

[Provide here a brief (two pages) description of the background and organization of your firm/entity and each associate for this assignment.]



B - Experience

[Using the format below, provide information on each assignment for which your firm, and each associate for this assignment, was legally contracted either individually as a corporate entity or as one of the major companies within an association, for carrying out consulting services similar to the ones requested under this assignment. Use not more than 20 pages.]

Assignment name:	Approx. value of the contract (in current US\$ or Euro):
Country: Location within country:	Duration of assignment (months):
Name of Client:	Total N ^o of staff-months of the assignment:
Address:	Approx. value of the services provided by your firm under the contract (in current US\$ or Euro):
Start date (month/year): Completion date (month/year):	N ^o of professional staff-months provided by associated Consultants:
Name of associated Consultants, if any:	Name of senior professional staff of your firm involved and functions performed (indicate most significant profiles such as Project Director/Coordinator, Team Leader):
Narrative description of Project:	
Description of actual services provided by your staff within the assignment:	

Firm's Name: _____



Form TECH-3: Comments and Suggestions on the Terms of Reference and on Counterpart Staff and Facilities to be Provided by the Client

On the Terms of Reference

[Present and justify here any modifications or improvement to the Terms of Reference you are proposing to improve performance in carrying out the assignment (such as deleting some activity you consider unnecessary, or adding another, or proposing a different phasing of the activities). Such suggestions should be concise and to the point, and incorporated in your Proposal.]



Form TECH-4: Description of Approach, Methodology and Work Plan for Performing the Assignment

[Technical approach, methodology and work plan are key components of the Technical Proposal. You are suggested to present your Technical Proposal (Not more than 40 pages, inclusive of charts and diagrams) divided into the following three chapters:

- a) Technical Approach and Methodology,
- b) Work Plan, and
- c) Organization and Staffing,

a) Technical Approach and Methodology. In this chapter you should explain your understanding of the objectives of the assignment, approach to the services, methodology for carrying out the activities and obtaining the expected output, and the degree of detail of such output. You should highlight the problems being addressed and their importance and explain the technical approach you would adopt to address them. You should also explain the methodologies you propose to adopt and highlight the compatibility of those methodologies with the proposed approach.

b) Work Plan. In this chapter you should propose the main activities of the assignment, their content and duration, phasing and interrelations, milestones (including interim approvals by the Client), and delivery dates of the reports. The proposed work plan should be consistent with the technical approach and methodology, showing understanding of the Terms of Reference and ability to translate them into a feasible working plan. A list of the final documents, including reports, drawings, and tables to be delivered as final output, should be included here. The work plan should be consistent with the Work Schedule of Form TECH-8.

c) Organization and Staffing. In this chapter you should propose the structure and composition of your team. You should list the main disciplines of the assignment, the key expert responsible, and proposed technical and support staff.]



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Form TECH-5: Team Composition and Task Assignments

Professional Staff				
Name of Staff	Firm	Area of Expertise	Position Assigned	Task Assigned



Form TECH-6: Curriculum Vitae (CV) for Proposed Professional Staff

1. **Proposed Position** [only one candidate shall be nominated for each position]: _____
2. **Name of Firm** [Insert name of firm proposing the staff]: _____

3. **Name of Staff** [Insert full name]: _____
4. **Date of Birth:** _____ **Nationality:** _____
5. **Education** [Indicate college/university and other specialized education of staff member, giving names of institutions, degrees obtained, and dates of obtainment]: _____

6. **Membership of Professional Associations:** _____

7. **Other Training** [Indicate significant training since degrees under 5 - Education were obtained]: _____

8. **Countries of Work Experience:** [List countries where staff has worked in the last ten years]: _____

9. **Languages** [For each language indicate proficiency: good, fair, or poor in speaking, reading, and writing]: _____

10. **Employment Record** [Starting with present position, list in reverse order every employment held by staff member since graduation, giving for each employment (see format here below): dates of employment, name of employing organization, positions held.]:

From [Year]: _____ To [Year]: _____

Employer: _____

Positions held: _____

<p>11. Detailed Tasks Assigned</p> <p>[List all tasks to be performed under this assignment]</p>	<p>12. Work Undertaken that Best Illustrates Capability to Handle the Tasks Assigned</p> <p>[Among the assignments in which the staff has been involved, indicate the following information for those assignments that best illustrate staff capability to handle the tasks listed under point 11.]</p> <p>Name of assignment or project: _____</p> <p>Year: _____</p> <p>Location: _____</p> <p>Client: _____</p> <p>Main project features: _____</p> <p>Positions held: _____</p> <p>Activities performed: _____</p>
<p>References</p>	<ol style="list-style-type: none"> 1. [[name], [title], [email], [phone] 2. [[name], [title], [email], [phone] 3. [[name], [title], [email], [phone]

13. Certification:

I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes myself, my qualifications, and my experience. I understand that any wilful misstatement described herein may lead to my disqualification or dismissal, if engaged.

_____ Date: _____
 [Signature of staff member or authorized representative of the staff] Day/Month/Year

Full name of authorized representative: _____



Form TECH-7: Staffing Schedule¹

	Name of Staff	Staff input (in the form of a bar chart) ²							Total staff-week input
		1	2	3	4	5	6	7	Total
1									
2									
3									
n									
Grand Total									

- 1 For Professional Staff the input should be indicated individually; for Support Staff it should be indicated by category (e.g.: draftsmen, clerical staff, etc.).
- 2 Weeks are counted from the start of the assignment. For each staff indicate separately staff input.

Form TECH-8 Work Schedule

N°	Activity ¹	Weeks ²						
		1	2	3	4	5	6	7
1								
2								
3								
4								
n								

- 1 Indicate all main activities of the assignment, including delivery of reports (e.g.: inception, interim, and final reports), and other benchmarks such as Client approvals. For phased assignments indicate activities, delivery of reports, and benchmarks separately for each phase.
- 2 Duration of activities shall be indicated in the form of a bar chart.

Financial Proposal

The Proposer is required to prepare and submit the Financial Proposal in a separate file from the Technical Proposal.

The Financial Proposal must provide a detailed cost breakdown and a payment schedule preferably linked to the schedule of deliverables presented in Annex 1. Provide separate figures for each functional grouping or category including fees and cost-reimbursable expenses. The Financial Section shall provide details of unit /daily fee rate per proposed team member and total consultancy fees based on the time proposed for performance of the services. Any estimates for cost-reimbursable expenses, should be listed separately and capped. The Financial Proposal should be inclusive of the taxes where applicable², and the applicable taxes should be clearly specified.

The Financial Proposal must also have the total consultancy fee summarized in addition to the break down covering the lump sum amount for purposes of determining the financial score and contract price. Financial Proposal Standard Forms (FIN Forms) shall be used for the presentation of the Financial Proposal.

² (a) Under Article 10 of the Headquarters Agreement, the property of the Green Climate Fund (“Fund”), including the property of any offices, subsidiary bodies or facilities established by the Fund, the Fund’s operations and transactions, and any property of the Fund in transit to or from the Headquarters, are:

- (i) Exempt from all direct taxes, except those which are, in fact, no more than charges for public utility services;
 - (ii) Exempt from all indirect taxes, including any value-added tax and/or other similar tax, and excise duties levied on important purchases of goods and services for official purposes; and
 - (iii) Exempt from customs duties, prohibitions and restrictions on imports and exports in respect of articles of any kind imported or exported by the Fund for its official use, except for prohibitions and restrictions on imports or exports relating to health and safety.
- (b) under bilateral agreements concluded between the GCF and certain countries, the GCF may be exempt from all taxation and from all customs duties, and from any obligation for the payment, withholding or collection of any tax or duty.



FIN Forms
Form FIN-1: Financial Proposal Submission Form

[Location, Date]

To: [Name and address of Client]

To whom it may concern:

We, the undersigned, offer to provide the consulting services for [Insert title of assignment] in accordance with your Request for Propodal dated [Insert Date]. Our attached Financial Proposal is for the sum of [Insert amount(s) in words and figures¹].

Our Financial Proposal shall be binding upon us subject to the modifications resulting from Contract negotiations, up to expiration of the validity period of the Proposal.

We understand you are not bound to accept any Proposal you receive.

We remain,

Yours sincerely,

Authorized Signature [In full and initials]: _____

Name and Title of Signatory: _____

Name of Firm: _____

Address: _____



1 Amounts must coincide with the ones indicated under Total Cost of Financial Proposal in Form FIN-2.

Form FIN-2: Summary of Costs

A. Total Cost of Financial Proposal

<i>Item</i>	<i>Costs</i>
	<i>Indicate with Currency</i>
Total Cost of Financial Proposal ¹	

¹ Indicate the total costs, net of local taxes, to be paid by the Client in each currency.

B. Break down of Fees and expenses per Cost Component

Description	Unit of measure (e.g. days, month, etc)	Total Period of Engagement	Unit cost / rate	Total Cost for the Period
I. Remuneration Costs				
Staff 1				
Staff 2				
.....				
<i>Sub-total</i>				
II. Travel Costs				
<i>Sub-total</i>				
III. Other Related Costs (Please specify)				
<i>Sub-total</i>				
TOTAL				

C. Breakdown of Fees and Expenses per Deliverables

SN	Deliverables <i>[list them as referred to in the TOR]</i>	Percentage of Total Price	Price (Lump Sum, All Inclusive)
1	Deliverable 1		
2	Deliverable 2		
	Total	100%	USD

Form FIN-3: Breakdown of Remuneration¹ (Lump-Sum)

(Information to be provided in this Form shall only be used to establish payments to the Consultant for possible additional services requested by the Client)

Name ²	Position ³	Staff-daily Rate

- 1 Form FIN-3 shall be filled in for the same Professional and Support Staff listed in Form TECH-7.
- 2 Professional Staff should be indicated individually; Support Staff should be indicated per category (e.g.: draftsmen, clerical staff).
- 3 Positions of the Professional Staff shall coincide with the ones indicated in Form TECH-5.

Annex 3

Evaluation Criteria

A. Evaluation and Comparison of Proposals

1. The proposals will be evaluated in a three-stage procedure, starting with administrative compliance to ensure the proposals includes all necessary required documents and is duly signed by the authorized representative. Evaluation of the technical proposal will follow and will be completed prior to any financial proposal being opened and evaluated. The financial proposal will be considered only if the submissions fulfil the minimum technical requirements.

B. Acceptance of Submissions

2. All proposers are expected to adhere to the requirements for submitting a proposal. Any proposals that fail to comply will be disqualified from further consideration as part of this evaluation. In particular:
 - Full compliance with the formal requirements for submitting a proposal
 - Submission of all requested documentation
 - Acceptance of the GCF Model contract – Where the proposer notes issues, these must be raised as part of the technical proposal for consideration during evaluation
3. The Technical Proposal shall include:
 - A brief description, including ownership details, date and place of incorporation of the firm, objectives of the firm, partnerships, qualifications, certificates, etc.;
 - Details to demonstrate vast experience in working with relevant multilateral development funds and familiarity with their operations; and
 - Demonstration of the firm's deep understanding of the GCF, mandate/business model and Investment Framework.

C. Evaluation of Technical Proposal

4. A reviewing committee shall be established to evaluate each technical proposal. The technical proposal is evaluated individually on the basis of its responsiveness to the technical requirements and will be assessed and scored according to the evaluation criteria below and as per scores in the table.

Evaluation Criteria			
No	Criteria	Score weight	Maximum Points Obtainable
1	Organization Capability, Overall Capacity & Expertise of the Firm / Organization submitting the proposal	25%	25
1.1	Experience in data strategy, data management and digital transformation with over 15 years' experience working with big technologist clients from fortune 100/500 companies in areas such as managing big data, complex and predictive AI analytics, data privacy, protocol and ethics, data governance solutions, data management and warehousing, business automation analytics, cloud, cloud migration services, enterprise data hubs, cloud-based change management, data architecture, visualization, machine learning and data science.	15%	15
1.2	Post-project on-demand support capabilities of the firm	5%	5
1.3	Organization's commitment to sustainability - demonstrates its commitment to embed sustainability into its own operations (defined by social, environmental, and economic considerations), in addition to how the firm plans to integrate similar measures in the execution of the contract to provide goods and services.	5%	5
2	Technical Approach / Methodology & Workplan	45%	45
2.1	Understanding of Requirements as stated in the Terms of Reference	15%	15
2.2	Commitment to Quality	10%	10
2.3	Proposal Implementation Approach and Data Strategy Methodology,	20%	20
3	Proposed Personnel and Capacity	30%	30
3.1	Management Structure and Key Personnel	30%	30
	TOTAL	100%	100

Technical proposals that score at least 75 points out of 100 will be considered as qualified for the review of financial proposal. Any proposal less than that will be disqualified from proceeding to the next step and its financial proposal shall be returned unopened following the award of the contract.

D. Evaluation of Financial Proposal

The financial proposal of all proposers which have attained the minimum score in the technical evaluation will be evaluated subsequently. The lowest evaluated Financial Proposal (Fm) is given the maximum financial score (Sf) of 100. The formula for determining the financial scores (Sf) of all other Proposals is calculated as following:

$Sf = 100 \times Fm / F$, in which “Sf” is the financial score, “Fm” is the lowest price, and “F” is the price of the proposal under consideration.



E. Consolidated evaluation

The weights given to the Technical (T) and Financial (P) Proposals are:

$T = 0.70$, and $P = 0.30$

Proposals will be ranked according to their combined technical (S_t) and financial (S_f) scores using the weights ($T =$ the weight given to the Technical Proposal; $P =$ the weight given to the Financial Proposal; $T + P = 1$) as following: $S = S_t \times T\% + S_f \times P\%$.

The firm achieving the highest combined technical and financial score will be invited for contract negotiations.

F. Award

The Award will be made to the responsive proposer who achieves the highest combined technical and financial score, following negotiation of an acceptable contract. GCF reserves the right to conduct negotiations with the Proposer regarding the contents of their offer. The award will be in effect only after acceptance by the selected proposer of the terms and conditions and the technical requirements.

Annex 4

Company Profile Form

Please respond to all questions.

Company details - vendor's name

Name:

General Information

Primary contact for sales/client services	
Address	
	Postal Code: Country:
Telephone:	Fax:
E-mail:	Web site:
Parent company, if any	
Subsidiaries, Associates, and/or Overseas Rep(s), if any	
Year established	
Registration Number	
Authorized Representative	(please provide applicable PoA)
Type of organization	Public enterprise () Private company () Organization sponsored (assisted by Government) () Other (please specify): ()
Type of Business	Manufacturer () Retailer () Authorized Agent () Consulting Company () Other (please specify): ()
Summary of main business activities	
No. of employees (by location)	
Staff turnover rate	
In-house working language (s)	
Bank Name: Bank Address: Account Holder: Account Number: IBAN: SWIFT:	
Nationality of owners¹	
Name	Nationality
1.	
2.	



Partners

If this is a part bid, list relevant recent experience of working with partners. Are there already formal or informal preferred partnership agreements in place?
1
2
3

Conflict of interest

Are there any likely circumstances or contracts in place that may introduce a conflict of interest with the parties to this contract? If so, explain how this will be mitigated
1
2

Certification

I, the undersigned, confirm that the information provided in this annex is correct. In the event of changes, details will be provided.

Name: _____ Title: _____

Signature: _____ Date: _____



**Annex 5
Acknowledgment Letter**

To whom it may concern,

We, the undersigned, acknowledge receipt of your Request for Proposal (RFP) No. RFP 2022/036 dated XX 16 November 2022, and hereby confirm that we:

INTEND DO NOT INTEND

to submit a proposal to the secretariat of the Green Climate Fund (GCF) by the deadline date of 28 December 2022 , and that we:

INTEND DO NOT INTEND

to send one (1) authorized representative³ to observe the public opening procedure on 28 December 2022, 1800 Hrs Korean Time. (Note: attendance to the public opening procedure is optional.)

We acknowledge that this RFP is confidential and proprietary to the GCF, and contains privileged information.

Name of Authorized Representative: _____

Signature: _____

Title: _____

Name and Address of Vendor: _____

Telephone: _____

Facsimile: _____

If you do not intend to submit a proposal to the GCF, please indicate the reason:

We do not have the capacity to submit a proposal at this time.

We cannot meet the requirements for this RFP.

We do not think we can make a competitive offer at this time.

Other (please specify): _____

Kindly return this acknowledgement letter immediately via e-mail to procurement@gcfund.org and bndeda@gcfund.org

NOTE: Due to Covid 19, public opening procedure is held online via Teams based on the requests for attendance.

³ Please provide name, last name, position and email address of the representative to which the virtual meeting invitation will be provided on the day of proposal opening.

**Annex 6
Timeline**

The Green Climate Fund will follow the timeline below for this RFP. Any changes to this timeline will be posted on the GCF website. Please note that the target dates and may be adjusted.

	Event	Responsible Party	Date (and time, KST*)
1	Issuance of RFP	GCF	16 November, 2022
2	Last day to send completed Acknowledgement Letter of RFP receipt	Tenderer	14 December, 2022
3	Last date for requests for clarification of the RFP	Tenderer	14 December, 2022
4	Last date to reply to questions received/ Last date for amendment	GCF	20 December, 2022
5	Date by which proposal must be received in Korea by GCF	Tenderer	28 December 2022; 1700 Hrs Korean Time
6	Date of opening of Technical Proposals	GCF	28 December 2022; 1800 Hrs Korean Time

* Proposal can be submitted before the deadline irrespective of whether the Acknowledgement Letter was submitted or not

*KST: Korean Standard Time (Seoul Time)



Annex 7

GCF Model Contract (Attached as a separate document)

By submitting a proposal to this RFP, Bidders are considered to have carefully reviewed the GCF Model Contract and be in agreement with all its terms and conditions. Where the bidder has specific issues of concern, those must be raised and indicated in the Technical proposal clearly for consideration during evaluation. Any request of amendments to GCF Model Contract and terms and conditions must be accompanied by detailed and compelling justification for review and consideration by GCF. It should be noted that request of amendments to GCF Model Contract and terms and conditions may negatively affect evaluation of the proposal and, in some cases, where such amendments are incompatible with GCF's binding policies and rules, may prejudice the final award.

***Note:** The Board adopted at the recent meeting a new policy on SEAH (Sexual Exploitation, Sexual Abuse and Sexual Harassment) and therefore the GCF is required to include new provisions in the General Conditions of Contract. While the specific wording is yet to be formulated, the eventual contract will need to include such new provisions.