



**BUSINESS EGYPT (BE)  
USAID FUNDED PROJECT**

**REQUEST FOR PROPOSALS (RFP) NO.**

**RFP-BE-24-054**

**PROVISION OF CAPACITY BUILDING SERVICES  
FOR FINANCIAL INSTITUTIONS**

**Banking & Non-Banking -  
to Develop or Upgrade their Environmental and Social Management Systems  
with a Climate Finance Focus.**

**PROPOSALS DEADLINE**

**APRIL 22<sup>nd</sup>, 2024**

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**WARNING:** Prospective Offerors who have received this document from a source other than the **Business Egypt project** should immediately contact [ProcurementBE@business-egypt.com](mailto:ProcurementBE@business-egypt.com) should immediately contact [ProcurementBE@business-egypt.com](mailto:ProcurementBE@business-egypt.com) and provide their name and mailing address in order that amendments to the RFP or other communications can be sent directly to them. Any prospective Offeror who fails to register their interest assumes complete responsibility in the event that they do not receive communications prior to the closing date. Any amendments to this solicitation will be issued and posted be issued electronically via [ProcurementBE@business-egypt.com](mailto:ProcurementBE@business-egypt.com).

DAI conducts business under the strictest ethical standards to assure fairness in competition, reasonable prices and successful performance or delivery of quality goods and equipment. DAI does not tolerate corruption, bribery, collusion, or conflicts of interest. Any requests for payment or favors by DAI employees should be reported as soon as possible to [ethics@dai.com](mailto:ethics@dai.com) or by visiting [www.dai.ethicspoint.com](http://www.dai.ethicspoint.com). Further, any attempts by an offeror or subcontractor to offer inducements to a DAI employee to influence a decision will not be tolerated and will be grounds for disqualification, termination, and possible debarment. See provision No. 9 for more details.

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**SYNOPSIS OF THE RFP**

REQUEST FOR PROPOSAL (RFP) NO.	<b>BE-24-054</b>
TITLE	<b>PROVISION OF CAPACITY BUILDING SERVICES FOR FINANCIAL INSTITUTIONS</b>
ISSUING OFFICE & EMAIL FOR SUBMISSION OF PROPOSALS	Procurement Department, Business Egypt Project Email for Submission of Proposals: <a href="mailto:BidsBE@business-egypt.com">BidsBE@business-egypt.com</a>
DEADLINE FOR RECEIPT OF QUESTIONS AND POINT OF CONTACT	<b>April-8-2024</b> , at 12:00 noon Cairo Local Time <a href="mailto:ProcurementBE@business-egypt.com">ProcurementBE@business-egypt.com</a>
DEADLINE FOR RECEIPT OF PROPOSALS	<b>APRIL 22, 2024</b> <b>AT 12:00 NOON CAIRO LOCAL TIME</b>
ANTICIPATED AWARD TYPE	<b>Indefinite Quantity Contract (IQC)</b> Bidders can provide their quotes in US\$. However, payment to Egyptian sub-contractors will only be made in EGP for each issued Task Order (TO) under the IQC. Payment amount will be calculated at the Central Bank of Egypt (CBE) selling exchange rate of the invoice issuance date.
BASIS FOR AWARD	An award will be made based on the Trade-Off Method. The award will be issued to the responsible and reasonable offeror who provides the best value to DAI and its client using a combination of technical and cost/price factors.

## 1. INTRODUCTION AND PURPOSE

### 1.1 PURPOSE

DAI Business Egypt (BE) is a five-year, USAID-funded program implemented by DAI Global LLC. The project started in November 2021 aims to substantially increase sales, revenues, and investments among Egyptian micro, small, and medium-sized enterprises (MSMEs) and, by doing so, create new job opportunities, especially for women and youth. Business Egypt supports the establishment, growth, and competitiveness of productive and innovative startups and promising MSMEs by creating a vibrant, high-functioning ecosystem of competitive, innovative enabling institutions that accelerate economic development in Egypt.

DAI BE is targeting three main focus areas:

**Objective I** – supporting entrepreneurs and startups through strengthening the entrepreneurship ecosystem, its enablers and service players. from their inception into becoming revenue-generating businesses.

**Objective II** – Supporting MSMEs through their growth journey, through linkages to financing, investing, and sustainable buyer-driven value chains

**Objective III** – supporting the business enabling environment at the local (governorate) and national levels in addressing the MSMEs 'challenges, specially within the sector-specific value chains.

In all of the above, BE focuses its efforts within sector-specific value chains, engaging MSMEs to strengthen the linkages with anchor firms within the value chains, to ensure sustainability and growth.

The BE program is designed to support partnering Financial Institutions (FIs) in the development or upgrade of an Environmental and Social Management Systems (ESMS) with a climate finance focus. An ESMS is defined as the set of FI's policies, processes, systems, and tools to measure and report financially material E&S risks, including financed emissions and climate-related risks such as transition and physical climate risks.

Under a signed Indefinite Quantity Contract (IQC) contract with the selected bidder, BE will issue Task Orders (TO) to support different FIs so that the bidder begins a diagnostic analysis to assess the FI's current E&S and climate practices and map out recommendations for improvement, including a proposed roadmap of activities, estimated LOE, and timeline – to be reviewed and approved by DAI Business Egypt and incorporating each FI's input. The roadmap will include activities to a) develop/upgrade an ESMS and a robust governance system; b) provide in parallel capacity building to integrate the ESMS within FI's existing operations, including relevant guidelines and manuals; and c) generate from the ESMS a first E&S and climate report, including an estimate of the FI's carbon footprint (Scopes 1 and 2, and, if possible, Scope 3), and provide recommendations for the FI to mitigate financially material risks and identify investment opportunities. The ESMS will be fully aligned with regulations and policies from the Central Bank of Egypt (CBE) and Financial Regulatory Authority (FRA) and relevant international standards (e.g., IFRS S1/S2 and Carbon Disclosure Project).

### 1.2 ISSUING OFFICE

The Issuing Office noted in the above Synopsis is the sole point of contact at DAI for purposes of this RFP. Any prospective offeror who fails to register their interest with this office assumes complete responsibility in the event that they do not receive direct communications (amendments, answers to questions, etc.) prior to the closing date.

### 1.3 TYPE OF AWARD ANTICIPATED

DAI anticipates awarding an Indefinite Quantity Contract (IQC) for the bidder meeting the evaluation criteria set in this RFP. Post the IQC award, BE will be issuing Task Orders for each FI with need of this support

## 2. GENERAL INSTRUCTIONS TO OFFERORS

### 2.1 GENERAL INSTRUCTIONS

“Offeror”, “Subcontractor”, “consortium” and/or “Bidder” means a firm proposing the work under this RFP. “Offer” and/or “Proposal” means the package of documents the firm submits to propose the work.

Offerors wishing to respond to this RFP must submit proposals, in English, in accordance with the following instructions. Offerors are required to review all instructions and specifications contained in this RFP. Failure to do so will be at the Offeror’s risk. If the solicitation is amended, then all terms and conditions not modified in the amendment shall remain unchanged.

Issuance of this RFP in no way obligates DAI to award a subcontract, IQC or purchase order. Offerors will not be reimbursed for any costs associated with the preparation or submission of their proposal. DAI shall in no case be responsible for liable for these costs.

Proposals are due no later than the date and time outlined on the cover page of this document. Proposals in electronic form must be submitted by email to: [BidsBE@business-egypt.com](mailto:BidsBE@business-egypt.com). The RFP number and title of the activity must be stated in the subject line of the email. Cost and technical proposals shall be submitted in separate email; Late offers will be rejected except under extraordinary circumstances at DAI’s discretion.

The submission to DAI of a proposal in response to this RFP will constitute an offer and indicates the Offeror’s agreement to the terms and conditions in this RFP and any attachments hereto. DAI reserves the right not to evaluate a non-responsive or incomplete proposal.

### 2.2 PROPOSAL COVER LETTER

A cover letter shall be included with the proposal on the Offeror’s company letterhead with a duly authorized signature and company stamp/seal using **ATTACHMENT B** as a template for the format. The cover letter shall include the following items:

- The Offeror will certify a validity period of **Maximum 350 days** for the prices provided.
- Acknowledge the solicitation amendments received.

### 2.3 QUESTIONS REGARDING THE RFP

Each Offeror is responsible for reading and complying with the terms and conditions of this RFP. Requests for clarification or additional information must be submitted in writing via email to the Issuing Office as specified in the Synopsis above. No questions will be answered by phone. Any verbal information received from a DAI or Business Egypt (BE) employee or other entity shall not be considered as an official response to any question regarding this RFP.

Copies of questions and responses will be distributed in writing to all prospective bidders who are on record as having received this RFP after the submission date for questions specified in the Synopsis above.

### 3. INSTRUCTIONS FOR THE PREPARATION OF TECHNICAL PROPOSALS

Technical proposals shall be in a separate e-mail from cost/price proposals and shall be clearly labeled as “**VOLUME I: TECHNICAL PROPOSAL**” in the email subject line.

Technical proposals shall include, as a minimum, the following content:

#### 1.1 TECHNICAL APPROACH, METHODOLOGY, OUTREACH, AND IMPLEMENTATION PLAN

The Bidder must describe how it will address/deliver the requirements of the RFP, by providing:

The proposal shall include a full understanding of the activity objectives, and how it will be managed to achieve the desired outcomes Content methodology, outline, objectives, intended activities outcomes per each Task Order

The offeror shall describe in detail the technical approach and methodology to be used for completing the required deliverables in support of implementing the task orders.

Outreach and visibility.

Reporting.

#### 1.2 MANAGEMENT STRUCTURE AND QUALIFICATIONS OF KEY PERSONNEL

The Bidder must provide:

The proposed team with high technical expertise, management capabilities and ability to complete the required activities under the RFP.

The proposal shall describe how an anticipated proposed team members have the necessary experience and capabilities to carry out the requirements requested in this document.

The proposal shall also include brief biographies of the proposed pool of experts who will be involved in the project, and their anticipated roles during the implementation of each Task Order (TO).

**1.3 CORPORATE PAST PERFORMANCE AND BIDDERS’ QUALIFICATIONS**

The Bidder must describe and explain how and why they are considered the best entity that can deliver this RFP requirements, by indicating the following:

- a) Business Licenses – Registration Papers, Tax Certification, etc.
- b) Profile – Cumulative experience of at least 10 years, describing the nature of business, field of expertise, licenses, certifications, accreditations, and at least three (3) recent awards of similar scope and duration.
- c) The company’s portfolio of previous projects for similar services as those required by Business Egypt, indicating description of the contract scope, number of beneficiaries, geographical location, contract duration, contract value, contact references/contact details.
- d) Project Management- Previous record in managing medium and large-scale projects.
- e) Prior relevant experience and proven record in delivering similar services.
- f) At least two references from previous customers/clients/partners reflecting the nature of projects implemented, their results, and the role of the applicant company.
- g) The information shall be supplied as a table and shall include the legal name and address of the organization for which services were performed, a description of work performed, the duration of the work and the value of the contract, Online URL; description of any problems encountered and how it was resolved, and a current contact phone number of a responsible and knowledgeable representative of the organization; acknowledgments and letter of compilation is highly recommended. See [ATTACHMENT F](#).
- h) Agree that Business Egypt can contact the selected clients to evaluate the quality of services provided.

**1.3 SERVICES SPECIFIED**

For this RFP, DAI needs the services described in [ATTACHMENT A](#).

**1.4 TECHNICAL EVALUATION CRITERIA**

Each proposal will be evaluated and scored against the evaluation criteria stated in the table below. Cost/Price proposals are not assigned points, but for overall evaluation purposes of this RFP, technical evaluation factors other than cost/price, are considered when combined more important than cost/price factors.

EVALUATION CRITERIA	MAXIMUM POINTS
Technical Approach & Methodology	35
Management Approach	35
Proven Track Record	30
<b>TOTAL POINTS</b>	<b>100</b>

## 2. INSTRUCTIONS FOR THE PREPARATION OF COST/PRICE PROPOSALS

### 2.1 COST/PRICE PROPOSALS

Cost/Price proposals shall be in a separate email from technical proposals and shall be clearly labeled as **“VOLUME II: COST/PRICE PROPOSAL”**.

Provided in [ATTACHMENT C](#) is a template for the Price Schedule, for the expected firm-fixed price Task Orders to be issued under the awarded IQC, the unit price to be provided as detailed in Attachment C.. Offerors shall complete the template including as much detailed information as possible.

It is important to note that Value Added Tax (VAT) shall be included on a separate line, these services are eligible for VAT exemption under the DAI prime contract. The Subcontractor is responsible for all applicable taxes and fees, as prescribed under the applicable laws for income, compensation, permits, licenses, and other taxes and fees due as required.

## 3. BASIS OF AWARD

### 3.1 BEST VALUE DETERMINATION

DAI BE will review all proposals and make an Indefinite Quantity Contract award based on the technical evaluation criteria stated above and select the offeror whose proposal provides the best value to DAI. DAI BE may also exclude an offer from consideration if it determines that an Offeror is "not responsible", i.e., that it does not have the management and financial capabilities required to perform the work required.

Evaluation points will not be awarded for cost. Cost will primarily be evaluated for realism and reasonableness. DAI BE may award to a higher priced offeror if a determination is made that the higher technical evaluation of that offeror merits the additional cost/price.

DAI may award to an Offeror without discussions. Therefore, the initial offer **must contain the Offeror’s best price and technical terms**.

### 3.2 RESPONSIBILITY DETERMINATION

DAI will not enter into any type of agreement with an Offeror prior to ensuring the Offeror’s responsibility. When assessing an Offeror’s responsibility, the following factors are taken into consideration:

1. Provide evidence of the required business licenses to operate in the host country, such as Company Tax Card and Commercial Registration.
2. Evidence of a Unique Entity ID (SAM) (explained below and instructions found in [ATTACHMENT D](#)).
3. The source, origin and nationality of the products or services are not from a Prohibited Country (explained below).
4. Having adequate financial resources to finance and perform the work or deliver goods or the ability to obtain financial resources without receiving advance funds from DAI.
5. Ability to comply with required or proposed delivery or performance schedules.
6. Have a satisfactory past performance record.
7. Have a satisfactory record of integrity and business ethics.



8. Have the necessary organization, experience, accounting, operational controls and technical skills.
9. Have the necessary production, construction and technical equipment and facilities if applicable.
10. Be qualified and eligible to perform work under applicable laws and regulations.

#### **4. ANTICIPATED POST-AWARD DELIVERABLES**

The deliverables will be designed for each Firm Fixed Price Task Order (TO) that will be issued under the IQC. Each TO will include a detailed SOW, that will be priced by the IQC holder based on the fixed unit prices agreed upon in the IQC.

#### **5. INSPECTION & ACCEPTANCE**

The designated DAI Project Manager will inspect, from time to time, the services being performed under each TO, to determine whether the activities are being performed in a satisfactory manner. The subcontractor shall be responsible for any countermeasures or corrective action, within the scope of this RFP, which may be required by the DAI BE Chief of Party as a result of such inspection.

#### **6. COMPLIANCE WITH TERMS AND CONDITIONS**

##### **6.1 GENERAL TERMS AND CONDITIONS**

Offerors agree to comply with the general terms and conditions for an award resulting from this RFP. The selected Offeror shall comply with all Representations and Certifications of Compliance listed in [ATTACHMENT G](#).

##### **6.2 PROHIBITED TECHNOLOGY**

Bidders MUST NOT provide any goods and/or services that utilize telecommunications and video surveillance products from the following companies: Huawei Technologies Company, ZTE Corporation, Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company, or any subsidiary or affiliate thereof, in compliance with FAR 52.204-25.

##### **6.3 SOURCE AND NATIONALITY**

Under the authorized geographic code for its contract DAI may only procure goods and services from the following countries.

Geographic Code 937: Goods and services from the United States, the cooperating country, and "Developing Countries" other than "Advanced Developing Countries", excluding prohibited countries. A list of the "Developing Countries" as well as "Advanced Developing Countries" can be found at: <http://www.usaid.gov/policy/ads/300/310maa.pdf> & <http://www.usaid.gov/policy/ads/300/310mab.pdf> respectively.

DAI must verify the source and nationality of goods and services and ensure (to the fullest extent possible) that DAI does not procure any goods or services from prohibited countries listed by the Office of Foreign

Assets Control (OFAC) as sanctioned countries. OFAC sanctioned countries may be searched within the System for Award Management (SAM) at [www.SAM.gov](http://www.SAM.gov). The current list of countries under comprehensive sanctions include Cuba, Iran, North Korea, Sudan, and Syria. Goods may not transit through or be assembled in comprehensive sanctioned origin or nationality countries, nor can the vendor be owned or controlled by a prohibited country. DAI is prohibited from facilitating any transaction by a third party if that transaction would be prohibited if performed by DAI.

By submitting a proposal in response to this RFP, Offerors confirm that they are not violating the Source and Nationality requirements of the goods or services being offered and that the goods and services comply with the Geographic Code and the exclusions for prohibited countries outlined above.

#### 6.4 UNIQUE ENTITY ID (SAM)

There is a **mandatory** requirement for your organization to provide a Unique Entity ID (SAM) to DAI. Without a Unique Entity ID (SAM), DAI cannot deem an Offeror “responsible” to conduct business with and therefore, DAI will not enter into a subcontract/purchase order or monetary agreement with any organization that does not have a Unique Entity ID (SAM). The determination of a successful offeror/applicant resulting from this RFP is contingent upon the winner providing a Unique Entity ID (SAM) to DAI. Offerors who fail to provide Unique Entity ID (SAM) will not receive an award and DAI will select an alternate Offeror.

All U.S. and foreign organizations which receive first-tier subcontracts/ purchase orders with a value of \$30,000 and above **are required** to obtain a Unique Entity ID (SAM) prior to signing of the agreement. Organizations are exempt from this requirement if the gross income received from all sources in the previous tax year was under \$300,000. DAI requires that Offerors sign the self-certification statement if the Offeror claims exemption for this reason.

For those required to obtain a Unique Entity ID (SAM), see [ATTACHMENT D](#) - Instructions for Obtaining a Unique Entity ID (SAM) - DAI’S Vendors, Subcontractors.

For those not required to obtain a Unique Entity ID (SAM), see [ATTACHMENT E](#): Self Certification for Exemption from Unique Entity ID (SAM) requirement.

### 7. ANTI-CORRUPTION AND ANTI-BRIBERY POLICY AND REPORTING RESPONSIBILITIES

DAI conducts business under the strictest ethical standards to assure fairness in competition, reasonable prices and successful performance or delivery of quality goods and equipment. **DAI does not tolerate the following acts of corruption:**

- Any requests for a bribe, kickback, facilitation payment or gratuity in the form of payment, gift or special consideration by a DAI employee, Government official, or their representatives, to influence an award or approval decision.
- Any offer of a bribe, kickback, facilitation payment or gratuity in the form of payment, gift or special consideration by an offeror or subcontractor to influence an award or approval decision.
- Any fraud, such as misstating or withholding information to benefit the offeror or subcontractor.
- Any collusion or conflicts of interest in which a DAI employee, consultant, or representative has a business or personal relationship with a principal or owner of the offeror or subcontractor that may appear to unfairly favor the offeror or subcontractor. Subcontractors must also avoid collusion or conflicts of interest in their procurements from vendors. Any such relationship must be disclosed immediately to DAI management for review and appropriate action, including possible exclusion from award.

These acts of corruption are not tolerated and may result in serious consequences, including termination of the award and possible suspension and debarment by the U.S. Government, excluding the offeror or subcontractor from participating in future U.S. Government business.

Any attempted or actual corruption should be reported immediately by either the offeror, subcontractor, or DAI staff to:

- Toll-free Ethics and Compliance Anonymous Hotline at (U.S.) +1-503-597-4328
- Hotline website – [www.DAI.ethicspoint.com](http://www.DAI.ethicspoint.com), or
- Email to [Ethics@DAI.com](mailto:Ethics@DAI.com)
- USAID’s Office of the Inspector General Hotline at [hotline@usaid.gov](mailto:hotline@usaid.gov).

By signing this proposal, the offeror confirms adherence to this standard and ensures that no attempts shall be made to influence DAI or Government staff through bribes, gratuities, facilitation payments, kickbacks, or fraud. The offeror also acknowledges that violation of this policy may result in termination, repayment of funds disallowed by the corrupt actions and possible suspension and debarment by the U.S. Government.

## 8. ATTACHMENTS

### 8.1 ATTACHMENT A: SCOPE OF WORK

#### BACKGROUND AND PURPOSE

DAI Business Egypt (BE) is a five-year, USAID-funded program implemented by DAI Global LLC. The project started in November 2021 aims to substantially increase sales, revenues, and investments among Egyptian micro, small, and medium-sized enterprises (MSMEs) and, by doing so, create new job opportunities, especially for women and youth. Business Egypt supports the establishment, growth, and competitiveness of productive and innovative startups and promising MSMEs by creating a vibrant, high-functioning ecosystem of competitive, innovative enabling institutions that accelerate economic development in Egypt.

DAI BE is targeting three main focus areas:

Objective I – Supporting entrepreneurs and startups through strengthening the entrepreneurship ecosystem, its enablers and service players, from their inception into becoming revenue-generating businesses.

Objective II – Supporting MSMEs through their growth journey, through linkages to financing, investing, and sustainable buyer-driven value chains.

Objective III – Supporting the business enabling environment at the local (governorate) and national levels in addressing the MSMEs' challenges, specially within the sector-specific value chains.

In all of the above, BE focuses its efforts within sector-specific value chains, engaging MSMEs to strengthen the linkages with anchor firms within the value chains, to ensure sustainability and growth.

#### PURPOSE & SCOPE OF ACTIVITY:

The BE program is designed to support partnering Financial Institutions (FIs) in the development or upgrade of an Environmental and Social Management Systems (ESMS) with a climate finance focus. An ESMS is defined as the set of FI policies, processes, systems, and tools to measure and report financially material E&S risks, including financed emissions and climate-related risks such as transition and physical climate risks. BE is looking into contracting a service provider that will support the Financial Institutions by conducting a diagnostic analysis to assess the FI's current E&S and climate practices and map out recommendations for improvement, including a proposed roadmap of activities, estimated LOE, and timeline – to be reviewed and approved by DAI Business Egypt and incorporating each FI's input. The roadmap will include activities to **a)** develop/upgrade an ESMS and a robust governance system; **b)** provide, in parallel, capacity building to integrate the ESMS within FI's existing operations, including relevant guidelines and manuals; and **c)** generate from the ESMS a first Environment & Social (E&S) and Climate Report, including an estimate of the FI's carbon footprint (Scopes 1 and 2, and, if possible, Scope 3), and provide recommendations for the FI to mitigate financially material risks and identify investment opportunities.

The ESMS will be fully aligned with regulations and policies from the Central Bank of Egypt (CBE) and Financial Regulatory Authority (FRA) As well as with relevant international standards (e.g., IFRS S1/S2 and Carbon Disclosure Project).

## TECHNICAL SCOPE OF WORK

SPECIFIC DETAILS WILL BE PROVIDED UNDER EACH TASK ORDER (TO) TO BE ISSUED UNDER THE IQC

### 1. REVIEW AND DIAGNOSTIC ANALYSIS (estimated on average 5-10 days per FI):

- Review FI's current Environmental and Social (E&S) and climate practices to measure and report financially material E&S risks, including financed emissions and climate-related risks such as transition and physical climate risks, with a focus on the FI's ESMS (as defined in the Purpose and Scope, above), if there is any. Assess these practices' alignment with international standards and guidelines by reviewing all relevant FI policies, processes, systems, and tools.
- Deliver a gap analysis report of the FI's E&S and climate practices, with an emphasis on the FI's ESMS (if there is any), benchmarking against national and international peers, CBE regulations, and standards (e.g., IFRS S1/S2). This analysis should incorporate a high-level assessment of the FI's investment decision making processes (e.g., what IT systems do they use? what is the role of the risk team?) across different stages in the investment's lifecycle.
- Map out recommendations for the development / upgrading of an ESMS, with a climate focus, and with the following characteristics:
  - Disclose actual and potential impacts of financially material E&S and climate related risks and opportunities on the FI's strategy and financial planning.
  - Align with international best practices, regulatory requirements, as well as with the FIs' specific goals and values.
  - Assign person(s) responsible for leading and implementing the ESMS.
- Provide a roadmap with a list of steps to develop and integrate new/updated ESMS across FI operations, including an ESMS, ESRM toolkit and a Reporting Framework. The main output of upon execution of the roadmap will be a report of the FI's ESMS. The content for this report will be contingent on the stage of development of each individual FI and a tentative/preliminary ESMS report will be provided alongside the proposed roadmap.
  - The roadmap will provide LOE estimates per activity and an implementation timeline.
  - The proposed roadmap for subsequent activities will seek to keep proposed LOE to a **maximum of 70 days**.
  - The roadmap will be reviewed and cleared by BE, and it will incorporate each FI's input.
- Identify other donor or government programs in Egypt that offer support to FIs and collaborate with them on technical assistance (TA) packages and funding to develop or upgrade their ESMS.

## **2. E&S AND CLIMATE FINANCE MANAGEMENT SYSTEM (estimated on average 20-30 days per FI):**

- Implement the recommendations proposed in Stage 1 above for the development or upgrading of an ESMS with a climate focus, as per the suggested roadmap, incorporating any suggestions from BE and each FI, and in parallel with the activities proposed in Stage 3.
- Organize kick-off meeting with FI's top management to ensure alignment for the implementation of the approved roadmap, including project rationale, activities, and deliverables.
- Establish or update relevant FI policies, processes, systems, and tools to measure and report the FI's financially material E&S and climate risks and opportunities as per the ESMS.
- Design an ESMS toolkit for the implementation of the ESMS and propose a Reporting Framework, to track progress and communicate impact to stakeholders, including Key Performance Indicators (KPIs)
- Early development of a robust governance structure for effective implementation and oversight of the ESMS, including the establishment of dedicated committees or working groups.
- If requested by the FI, co-design with the FI's senior leadership an E&S and climate finance vision to support the FI's long term growth and profitability and include identification of strategic growth opportunities in climate finance.
- Facilitate collaboration with relevant stakeholders, industry networks, and regulatory bodies to stay updated on emerging trends, best practices, and regulatory requirements.

## **3. ESMS CAPACITY BUILDING AND INTEGRATION (estimated on average 15-20 days per FI):**

- Implement the recommendations proposed in Stage 1 above for the FI's CAPACITY BUILDING and integration of the new/upgraded ESMS with a climate focus, as per the suggested roadmap, incorporating any suggestions from BE and each FI, and in parallel with activities proposed in Stage 2.
- Design and deliver capacity building programs on E&S and climate principles, and best practices for different levels within each FI, including board members, senior management, investment teams, and risk and reporting teams. The training should include customized training materials, case studies, and practical exercises to enhance participants' understanding of E&S and climate within their respective roles and responsibilities within the context of the ESMS.
- Design and deliver capacity building and guidelines/manuals to integrate the new/upgraded ESMS, the ESMS, ESRM toolkit and the Reporting Framework, and use it on an ongoing basis across all relevant teams and areas in the FI, and including risk assessment methodologies, tools for screening potential borrowers or investment targets, and processes for mitigating identified risks.
- Engage loan officers to support meeting the requirements of the ESMS, especially in the case of MSMEs and investees from low-income and/or marginalized populations.

## **4. IMPACT MEASUREMENT AND REPORTING (estimated on average 15-20 days per FI):**

- Conduct an FI E&S and climate assessment as per the ESMS following the CBE regulations and guidelines (note: no FRA/CBE blueprint is currently available) and support the FI in delivering its first complete ESMS report. The assessment will also include an estimate of the FI's carbon footprint and

will take into consideration Egypt's Nationally Determined Contributions (NDCs) to cut carbon emissions. The output is not expected to include any transaction-related support.

- Based on the findings of the ESMS report provide recommendations for mitigating financially material adverse E&S and climate-related risks, improve compliance with relevant E&S and climate regulations and standards, including the development of green finance products, green fundraising opportunities, and opportunities for the financing of small and medium-scale initiatives such as renewable and clean energy projects, green economy, or energy efficient manufacturing initiatives, in line with CBE priority sectors.
- Assist in developing a communication and reporting framework that enables the FI to effectively share its E&S and climate performance to internal and external stakeholders, especially the CBE.
- Establish a framework for monitoring and evaluating the effectiveness of the ESMS, and to continuously identify areas for improvement.

**BIDDER'S QUALIFICATIONS:**

- At least 5-10 years of demonstrated experience working with financial institutions on sustainability and climate finance.
- Understanding of leading frameworks and standards for integrating ESG, sustainability, and climate finance in the financial sector.
- Experience in analyzing and building the capacity of financial institutions to decarbonize financed emissions and assess climate risks.
- Experience in leading climate policy dialogues and providing advisory services to high-level policymakers and executives in the financial sector.
- Strong communication, presentation, workshop facilitation, and writing skills.

## ATTACHMENT B: PROPOSAL COVER LETTER

[On Firm's Letterhead]

<Insert date>

TO: [Click here to enter text.](#)  
DAI Global LLC

We, the undersigned, provide the attached proposal in accordance with **RFP-**[Click here to enter text.](#) -[Click here to enter text.](#) issued on [Click here to enter text.](#)

I certify a validity period of [Click here to enter text.](#) days for the prices provided in the attached Price Schedule/Bill of Quantities. Our proposal shall be binding upon us subject to the modifications resulting from any discussions.

*Offeror shall verify here the items specified in this RFP document.*

We understand that DAI is not bound to accept any proposal it receives.

Yours sincerely,

Authorized Signature:

Name and Title of Signatory: [Click here to enter text.](#)

Name of Firm: [Click here to enter text.](#)

Address: [Click here to enter text.](#)

Telephone: [Click here to enter text.](#)

Email: [Click here to enter text.](#)

Unique Entity ID (SAM) #:

Company Seal/Stamp:



### 8.3 ATTACHMENT C – PRICE SCHEDULE

Bidders are requested to fill in the unit prices on the table below, per the following details:

Prices will be fixed for 360 days following the Indefinite Quantity Contract (IQC) award. For each Task Order (TO) to be issued, the IQC holder will be asked to provide the quantities for each technical position based on a Scope of Work (SOW) that will include the FI details.

ITEM	DESCRIPTION	UNIT	QUANTITY	\$ UNIT PRICE
<b>A. LABOR</b>				
1	Position / Title	Day	1	
2	Position / Title	Day	1	
3	Position / Title	Day	1	
<b>B. BENEFITS</b>				
1	Fringe Benefits	Lumpsum	%	
2	Additional Benefits			
<b>C. OTHER DIRECT COSTS</b>				
1	Airfare	Each	1	
2	Transport	Km/day	1	
3	Accommodation	Night	1	
4	Per Diem	Person/day	1	
5	Translation	Page	1	
6	Training Costs	Person/day	1	
7	Printing & Production	Page/lumpsum	1	

## 8.4 ATTACHMENT D: INSTRUCTIONS FOR OBTAINING AN UNIQUE ENTITY ID (SAM) NUMBER - DAI'S VENDORS, SUBCONTRACTORS

**Note: There is a Mandatory Requirement for your Organization to Provide a Unique Entity ID (SAM) to DAI**

I. **SUBCONTRACTS/PURCHASE ORDERS:** All domestic and foreign organizations which receive first-tier subcontracts/ purchase orders with a value of \$30,000 and above are required to obtain a Unique Entity ID (SAM) prior to signing of the agreement. *Your organization is exempt from this requirement if the gross income received from all sources in the previous tax year was under \$300,000. Please see the self-certification form attached.*

II. **MONETARY GRANTS:** All foreign entities receiving first-tier monetary grants (standard, simplified and FOGs) with a value equal to or over \$25,000 and performing work outside the U.S. must obtain a Unique Entity ID (SAM) prior to signing of the grant. All U.S. organizations who are recipients of first-tier monetary grants of any value are required to obtain a Unique Entity ID (SAM); the exemption for under \$25,000 applies to foreign organizations only.

**NO SUBCONTRACTS/POs (\$30,000 + above) or MONETARY GRANTS WILL BE SIGNED BY DAI WITHOUT PRIOR RECEIPT OF AN UNIQUE ENTITY ID (SAM).**

*Note: The determination of a successful offeror/applicant resulting from this RFP/RFQ/RFA is contingent upon the winner providing a Unique Entity ID (SAM) to DAI. Organizations who fail to provide a Unique Entity ID (SAM) will not receive an award and DAI will select an alternate vendor/subcontractor/grantee.*

-----  
**Background:**

**Summary of Current U.S. Government Requirements - Unique Entity ID (SAM)**

Effective April 4, 2022, entities doing business with the federal government will use the Unique Entity Identifier (SAM) created in SAM.gov. The Unique Entity ID (SAM) is a 12-character alphanumeric value managed, granted, and owned by the government. This allows the government to streamline the entity identification and validation process, making it easier and less burdensome for entities to do business with the federal government.

Entities are assigned an identifier during registration, or one can be requested at SAM.gov without needing to register. Ernst and Young provides the validation services for the U.S. Government. The information required for getting a Unique Entity ID (SAM) without registration is minimal. It only validates your organization's legal business name and address. It is a verification that your organization is what you say it is.

The Unique Entity ID (SAM) does not expire.

**Summary of Previous U.S. Government Requirements – DUNS**

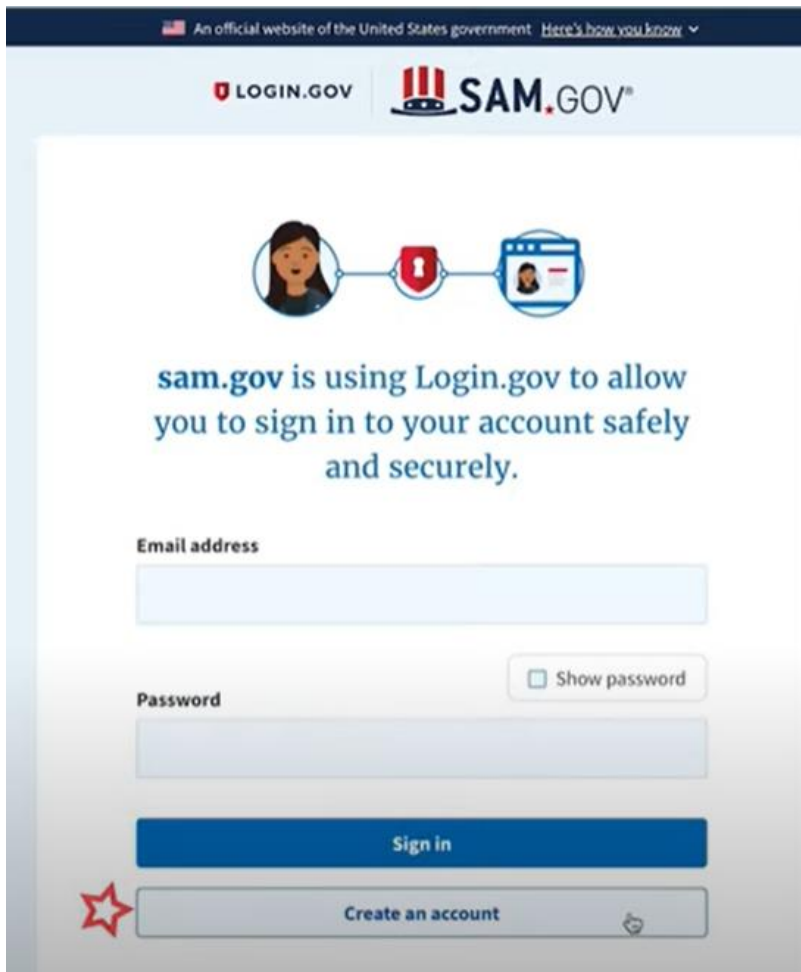
The Data Universal Numbering System (DUNS) is a system developed and managed by Dun and Bradstreet that assigns a unique nine-digit identifier to a business entity. It is a common standard world-wide and was previously used by the U.S. Government to assign unique entity identifiers. This system was retired by the U.S. Government on April 4, 2022 and replaced with the Unique Entity Identifier (SAM). After April 4, 2022, the federal government will have no requirements for the DUNS number.

If the entity was registered in SAM.gov (active or inactive registration), an Unique Entity ID (SAM) was assigned and viewable in the entity registration record in SAM.gov prior to the April 4, 2022, transition. The Unique Entity ID (SAM) can be found by signing into SAM.gov and selecting the Entity Management widget in your Workspace or by signing in and searching entity information.

**Instructions detailing the process to be followed to obtain a Unique Entity ID (SAM) for your organization begin on the next page.**

**THE PROCESS FOR OBTAINING AN UNIQUE ENTITY ID IS OUTLINED BELOW:**

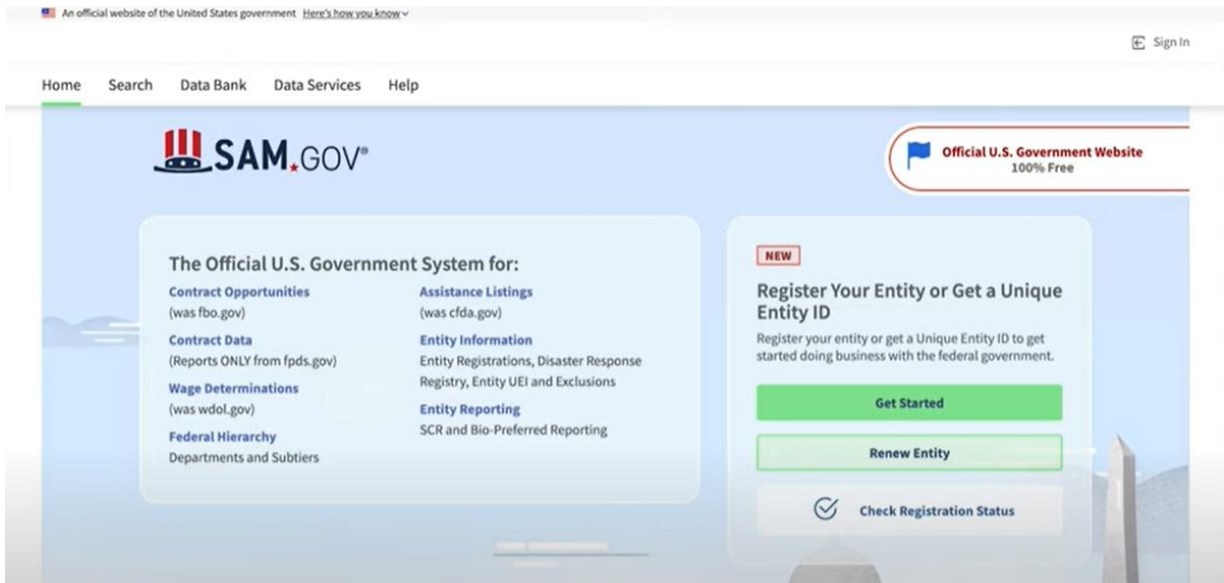
1. Have the following information ready to request an Unique Entity ID (SAM)
  - a. Legal Business Name
  - b. Physical Address (including ZIP + 4)
  - c. SAM.gov account (this is a user account, not actual SAM.gov business registration).
    - i. **As a new user**, to get a SAM.gov account, go to [www.sam.gov](http://www.sam.gov).
1. Click “Sign In” on the upper right-hand corner.
2. Click on “Create a User Account”



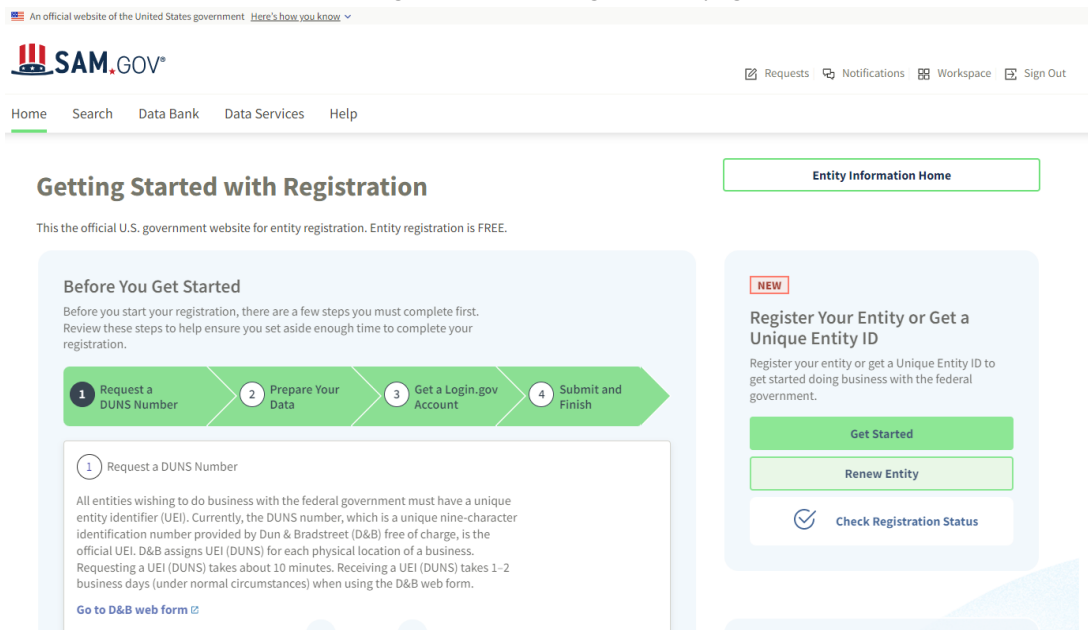
3. Choose Account Type:
  - a. Create an Individual User Account to perform tasks such as register/update your entity, create, and manage exclusion records or to view FOUO level data for entity records.
  - b. Create a System User Account if you need system-to-system communication or if performing data transfer from SAM to your government database system. Complete the requested information, and then click “Submit.”
4. Click “DONE” on the confirmation page. You will receive an email confirming you have created a user account in SAM.
5. Click the validation link in the email that contains the activation code within 48 hours to activate your user account. If the email link is not hyperlinked (i.e., underlined or appearing in a different color), please copy the validation link and paste it into the browser address bar. You can now register an entity.

NOTE: Creating a user account does not create a registration in SAM, nor will it update/renew an existing registration in SAM.

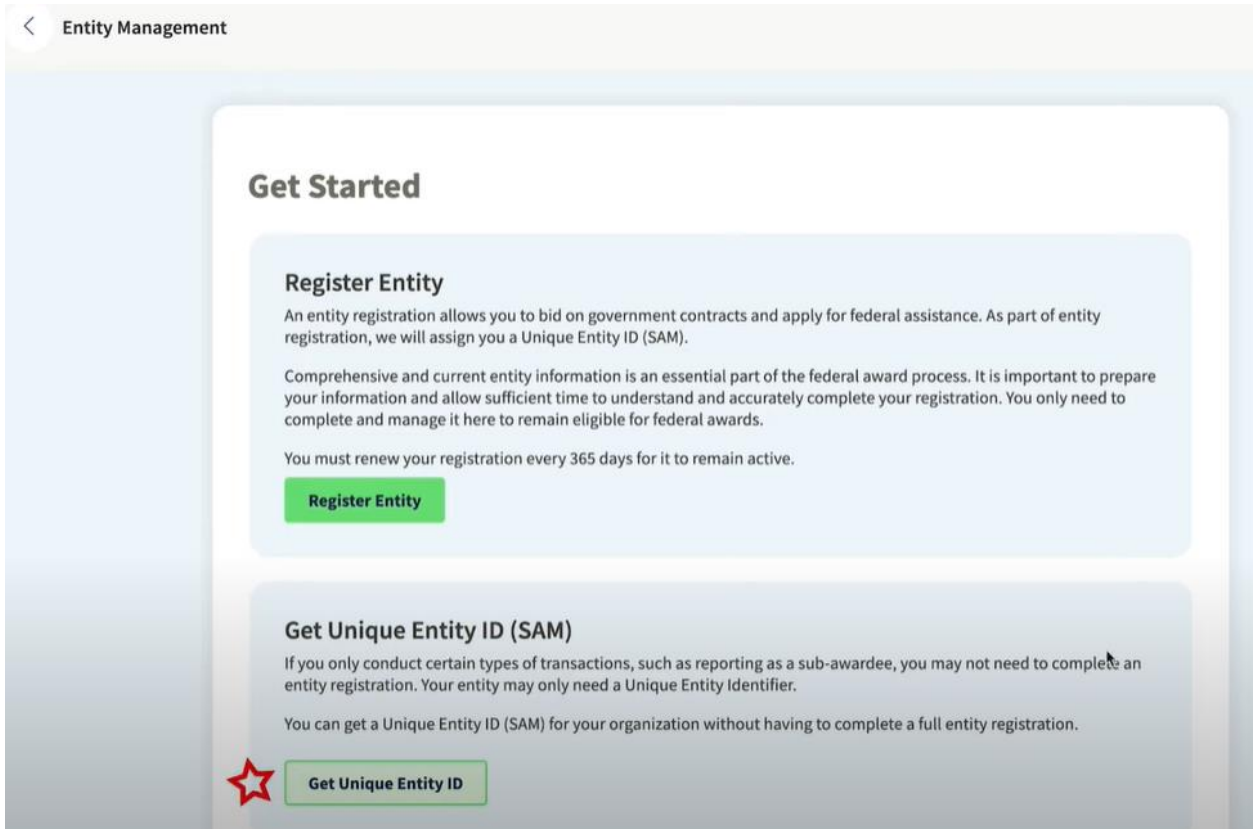
- 2. Once you have registered as a user, you can get a Unique Entity ID by selecting the “Get Started” button on the SAM.gov home page.



- 3. Select “Get Started” on the Getting Started with Registration page.



- 4. Select “Get Unique Entity ID” on the Get Started page.



5. Enter Entity Information.



a. If you previously had a DUN Number, make sure your Legal Business Name and Physical Address are accurate and match the Entity Information, down to capitalization and punctuation, used for DUNS registration.

6. When you are ready, select “Next”

7. Confirm your company’s information.



a. On this page you will have the option to restrict the public search of this information. “Allow the selected record to be a public display record.” If you uncheck this box, only you and the federal government users will be able to search and view the entity information and entities like DAI will not be able to independently verify that you have a Unique Entity Identifier (SAM).

**Allow the selected record to be a public display record.**

If you feel displaying non-sensitive information like your registration status, legal business name and physical address in the search engine results poses a security threat or danger to you or your organization, you can restrict the public viewing of your record in SAM's search engine. However, your non-sensitive registration information remains available under the Freedom of Information Act to those who download the SAM public data file. [Learn more about SAM public search results](#).

- 8. When you are ready, select "Next"
- 9. Once validation is completed, select "Request UEI" to be assigned a Unique Entity ID (SAM). Before requesting your UEI (SAM), you must certify that you are authorized to conduct transactions under penalty of law to reduce the likelihood of unauthorized transactions conducted for the entity.



### Request UEI

You have completed validation. Select **Request UEI** to be assigned a Unique Entity ID.

**VERIFIED MATCH:**

**US TEST COMPANY 999** ● Public

**DUNS** UNIQUE ENTITY ID:  
362267515

PHYSICAL ADDRESS  
3501 CORPORATE PKWY  
CENTER VALLEY, PA 18034  
US

Before requesting your UEI, please certify that you are authorized to conduct transactions under penalty of law to reduce the likelihood of unauthorized transactions conducted for my entity. Then select **Request UEI**.

I certify that I am authorized to conduct transactions on behalf of the entity.

- 10. The Unique Entity ID will be shown on the next page. SAM.gov will send an email confirmation with your Unique Entity ID.



## Receive UEI

Congratulations! You have been assigned the following Unique Entity ID.

**EH4HG9MLR7Q6**

**VERIFIED MATCH:**

**US TEST COMPANY 999** • Public

**DUNS** UNIQUE ENTITY ID:  
362267515

**SAM** UNIQUE ENTITY ID:  
EH4HG9MLR7Q6

PHYSICAL ADDRESS  
3501 CORPORATE PKWY  
CENTER VALLEY, PA 18034  
US

You have finished getting your Unique Entity ID, select **Done** to return to your workspace.

To continue with registration, select **Continue Registration**.

[Continue Registration](#) [Done](#)

11. If you need to view the Unique Entity ID from SAM in the future or update the organization’s information, sign into SAM.gov and go to “Entity Management” widget.

The screenshot displays the SAM.GOV Workspace interface. At the top, the SAM.GOV logo is on the left, and navigation links for Requests, Notifications, Workspace, and Sign Out are on the right. Below the logo, a navigation bar includes Home, Search, Data Bank, Data Services, and Help. The main content area is titled "Workspace" and features two primary sections: "Entity Management" and "System Accounts".

**Entity Management**  
What do I need for registration? [Get Started](#)

**Entity Registration**

0	0	0	0
ACTIVE	DRAFT	WORK IN PROGRESS	SUBMITTED

Next Update Due: Due in Next 30 days: **0 Entity Registrations**

**Unique Entity ID**

1	0
ACTIVE	DRAFT

**System Accounts**

1	0	0	0	0
ACTIVE	DRAFT	CHANGE REQUEST	PENDING	DEACTIVATED

**Profile**

Profile information and icons for Downloads, Saved Searches, and Following.

**Pending Requests**

No pending requests. [See All](#)

**Notifications**

No available notifications. [See All](#)

**Add A New Role**

Select on the options below to request a new role. If you need a role that you do not see below, contact an administrator for your organization directly.

Select a Role



### 8.3 ATTACHMENT E: SELF CERTIFICATION FOR EXEMPTION FROM UNIQUE ENTITY ID (SAM) REQUIREMENT

Legal Business Name:

---

Physical Address:

---

City:

---

Country:

---

Signature of Certifier

---

Full Name of Certifier (Last Name, First/Midd Names):

---

Title of Certifier:

---

Date of Certification (mm/dd/yyyy):

---

The sub-contractor/vendor whose legal business name is provided herein, certifies that we are an organization exempt from obtaining a **Unique Entity ID (SAM)**, as the gross income received from all sources in the previous tax year is under USD \$300,000.

\*By submitting this certification, the certifier attests to the accuracy of the representations and certifications contained herein. The certifier understands that s/he and/or the sub-contractor/vendor may be subject to penalties, if s/he misrepresents the sub-contractor/vendor in any of the representations or certifications to the Prime Contractor and/or the US Government.

The sub-contractor/vendor agrees to allow the Prime Contractor and/or the US Government to verify the company name, physical address, or other information provided herein. Certification validity is for one year from the date of certification.

### 8.4 ATTACHMENT F: PAST PERFORMANCE FORM

Include projects that best illustrate your work experience relevant to this RFP, sorted by decreasing order of completion date.

Projects should have been undertaken in the past three years. Projects undertaken in the past six years may be taken into consideration at the discretion of Business Egypt.

#	PROJECT TITLE	DESCRIPTION OF ACTIVITIES	LOCATION GOVERNORATE / CITY	CLIENT NAME/ TEL NO.	COST IN EGP	START-END DATES	COMPLETED ON SCHEDULE (YES/NO)	COMPLETION LETTER RECEIVED? (YES/NO)	TYPE OF AGREEMENT, SUBCONTRACT, GRANT, PO (FIXED PRICE, COST REIMBURSABLE)
1									
2									
3									
4									
5									

## 8.5 ATTACHMENT G: REPRESENTATIONS AND CERTIFICATIONS OF COMPLIANCE

1. Federal Excluded Parties List - The Bidder Select is not presently debarred, suspended, or determined ineligible for an award of a contract by any Federal agency.
2. Executive Compensation Certification- FAR 52.204-10 requires DAI, as prime contractor of U.S. federal government contracts, to report compensation levels of the five most highly compensated subcontractor executives to the Federal Funding Accountability and Transparency Act Sub-Award Report System (FSRS)
3. Executive Order on Terrorism Financing- The Contractor is reminded that U.S. Executive Orders and U.S. law prohibits transactions with, and the provision of resources and support to, individuals and organizations associated with terrorism. It is the legal responsibility of the Contractor/Recipient to ensure compliance with these Executive Orders and laws. Recipients may not engage with, or provide resources or support to, individuals and organizations associated with terrorism. No support or resources may be provided to individuals or entities that appear on the Specially Designated Nationals and Blocked persons List maintained by the US Treasury (online at [www.SAM.gov](http://www.SAM.gov)) or the United Nations Security Designation List (online at: [http://www.un.org/sc/committees/1267/aq\\_sanctions\\_list.shtml](http://www.un.org/sc/committees/1267/aq_sanctions_list.shtml)). This provision must be included in all subcontracts/sub awards issued under this Contract.
4. Trafficking of Persons – The Contractor may not traffic in persons (as defined in the Protocol to Prevent, Suppress, and Punish Trafficking of persons, especially Women and Children, supplementing the UN Convention against Transnational Organized Crime), procure commercial sex, and use forced labor during the period of this award.
5. Certification and Disclosure Regarding Payment to Influence Certain Federal Transactions – The Bidder certifies that it currently is and will remain in compliance with FAR 52.203-11, Certification and Disclosure Regarding Payment to Influence Certain Federal Transactions.
6. Organizational Conflict of Interest – The Bidder certifies that will comply FAR Part 9.5, Organizational Conflict of Interest. The Bidder certifies that is not aware of any information bearing on the existence of any potential organizational conflict of interest. The Bidder further certifies that if the Bidder becomes aware of information bearing on whether a potential conflict may exist, that Bidder shall immediately provide DAI with a disclosure statement describing this information.
7. Prohibition of Segregated Facilities - The Bidder certifies that it is compliant with FAR 52.222-21, Prohibition of Segregated Facilities.
8. Equal Opportunity – The Bidder certifies that it does not discriminate against any employee or applicant for employment because of age, sex, religion, handicap, race, creed, color, or national origin.
9. Labor Laws – The Bidder certifies that it is in compliance with all labor laws.
10. Federal Acquisition Regulation (FAR) – The Bidder certifies that it is familiar with the Federal Acquisition Regulation (FAR) and is in not in violation of any certifications required in the applicable clauses of the FAR, including but not limited to certifications regarding lobbying, kickbacks, equal employment opportunity, affirmation action, and payments to influence Federal transactions.
11. Employee Compliance – The Bidder warrants that it will require all employees, entities and individuals providing services in connection with the performance of a DAI Purchase Order to comply with the provisions of the resulting Purchase Order and with all Federal, State, and local laws and regulations in connection with the work associated therein.

By submitting a proposal, offerors agree to fully comply with the terms and conditions above and all applicable U.S. federal government clauses included herein and will be asked to sign these Representations and Certifications upon award.

## 8.6 ATTACHMENT H: PROPOSAL CHECKLIST

Offeror: \_\_\_\_\_

Have you?

- Submitted your proposal to DAI in a sealed envelope to the address (electronic or mailing) as specified in General Instructions above?

Does your proposal include the following?

- Signed Cover Letter (*use template in Attachment B*)
- Separate Technical and Cost proposals individually sealed and labeled as Volume I and Volume II respectfully.
- Proposal of the Product or Service that meets the technical requirements as per Attachment A
- Response to each of the evaluation criteria
- Documents use to determine Responsibility
- Evidence of a Unique Entity ID (SAM) OR Self Certification for Exemption from Unique Entity ID (SAM) Requirement
- Past Performance (use template in [ATTACHMENT F](#))