



## **Pakistan Regional Economic Integration Activity (PREIA)**

Request for Proposals (RFP)

No. REQ-PRE-20-0011

### **Development of Institutional Strategy and Implementation Plan for TDAP**

Issue Date: June 29, 2020

**WARNING:** WARNING: Prospective Offerors who have received this document from a source other than the Pakistan Regional Economic Integration Activity (PREIA), Third Floor, National Telecommunication Headquarters (NTC) Building, G-5/2, Islamabad, Capital territory 44000, Pakistan PREIAprocurement@DAI.com, should immediately contact PREIAprocurement@DAI.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 on [www.Devex.com](http://www.Devex.com). Offerors are encouraged to check this website periodically.

**Disclaimer:** Issuance of this RFP in no way obligates DAI PREIA to award a purchase order and offerors will not be reimbursed for any costs associated with the preparation and submission of their proposals. DAI PREIA reserve the right to accept or reject any or all proposals without assigning any reason thereof.

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## 1. Synopsis of the RFP

RFP No.	<b>REQ-PRE-20-0011</b>
Issue Date	June 29, 2020
Title	<b>Development of Institutional Strategy and Implementation Plan for TDAP</b>
Issuing Office & Point of Contact	<b>Procurement Department, Operations Manager</b>
Deadline for Receipt of Questions	<p><b>Questions (regarding SOW or RFP) due by (01:00 PM PST) July 6, 2020, (if any)</b></p> <p>Each Offeror is responsible for reading very carefully and understanding fully the terms and conditions of this RFP. All communications regarding this solicitation are to be made solely through the Issuing Office and must be submitted no later than the date specified. All questions received will be compiled and answered in writing and distributed to all interested Offerors.</p>
Email Address for Submission of Questions	<a href="mailto:PREIAProcurement@dai.com">PREIAProcurement@dai.com</a>
Deadline for Receipt of Proposals	Separately files of Technical and Financial Proposals are due by or before close of business (5:00 PM PST) on <b>July 13, 2020.</b>
Email Address for Submission of Proposals	<a href="mailto:PREIAProcurementINBOX@dai.com">PREIAProcurementINBOX@dai.com</a>
Anticipated Award Type	DAI anticipates issuing a <b>Firm Fixed Price Purchase Order</b> . This is only the anticipated type of award and may be changed as a result of negotiations.
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.

## 2. Introduction and Purpose

### 2.1 Purpose

DAI, the implementer of the USAID's Pakistan Regional Economic Integration Activity (PREIA), invites qualified offerors to submit proposals to supply and deliver Consultancy for Institutional Strategy Development in support of program implementation.

### 2.2 Issuing Office

The Issuing Office and Contact Person 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.

### 2.3 Type of Award Anticipated

DAI anticipates awarding a **Firm Fixed Price Purchase Order**. This subcontract type is subject to change during the course of negotiations.

## 3. General Instructions to Offerors

### 3.1 General Instructions

- “Offeror”, “Subcontractor”, 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.
- Proposals are due no later than July 13, 2020, to be submitted on [PREIAProcurementINBOX@dai.com](mailto:PREIAProcurementINBOX@dai.com). Late offers may only be accepted under extraordinary circumstances at PREIA'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.
- Offers must show unit prices, extensions, and total price. Proposal must be a fixed price, expressed in US Dollars.
- Offerors are asked to specify the available resources and the total number of calendar days it will take to complete the assignment.
- Bidders must provide fixed prices, inclusive of all applicable tax. Tax at source will be deducted from all payments as per government rules, unless a valid exemption certificate is provided by the supplier.
- Small/ medium size business, minorities owned firms, women led business and those owned by other disadvantaged groups will be given preference, in any such case additional documentation must be provided along with Proposal.
- Only those bids will be considered which are prepared in legible writing and are absolutely clear and unambiguous. Any unavoidable cutting/over-writing must be signed and stamped by authorized signatory of the bidders
- Submission of Proposal against this RFP would automatically mean that supplier agrees to all the terms and conditions mentioned in this RFP.

- Arithmetical errors will be rectified on the following basis:
  - If there is a discrepancy between the unit price and the total price that is obtained by multiplying the unit price and quantity, the unit price shall prevail, and the total price shall be corrected.
  - If there is a discrepancy between words and figures the amount in words shall prevail.
  - If the Offeror does not accept the correction of errors, its Proposal will be rejected.

### 3.2 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 minimum validity period of 90 days for the prices provided.
- Acknowledge the solicitation amendments received.

### 3.3 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 or in writing 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 PREIA 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 specified in the Synopsis above.

## 4. Instructions for the Preparation of Technical Proposals

Technical proposals shall be submitted as a separate file from cost/price proposals and shall be clearly labeled as "VOLUME I: TECHNICAL PROPOSAL".

Technical proposals shall include the following contents

1. Technical Approach — Description of the proposed services which meets or exceeds the stated technical specifications or scope of work in Attachment A. The proposal must show how the Offeror plans to complete the work and describe an approach that demonstrates the achievement of timely and acceptable performance of the work.
2. Management approach – Description of the Offeror's staff assigned to the project. The proposal should describe how the proposed team members have the necessary experience and capabilities to carry out the Technical Approach
3. Past Performance –Provide a list of at least three (3) recent awards of similar scope and duration. 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, 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. See Attachment F.

#### 4.1 Services Specified

For this RFP, DAI is in need of the services described in Attachment A.

#### 4.2 Evaluation Criteria

Each Technical proposal will be evaluated and scored against the evaluation criteria stated in the table below. Only the Technical proposals scoring over 70 points will proceed to the next phase of evaluations and onward consideration for award. **Overall weightage of technical proposal shall be 70% while the weightage of Financial proposal will be 30%.**

<b>Evaluation Criteria</b>	<b>Maximum Points</b>
<b>Technical Approach</b>	
1. Technical know-how – Does the proposal clearly explain, understand and respond to the requirements of the project as stated in the Scope of Work?	10 points
2. Does proposal include description of proposed approach and development tools?	10 points
3. Did the bidder provide a compliance sheet explaining how each SOW requirement will be met?	10 points
4. Did the bidder demonstrate dedication to quality control?	10 points
5. Does the proposal demonstrate the offeror's knowledge related to Institutional Strategy Development?	10 points
<b>Subtotal Points- Technical Approach</b>	<b>50 Points</b>
<b>Management Approach</b>	
1. Does the offeror have sufficient staff who are qualified and available to complete the work as proposed? Do the proposed team members have necessary experience and capabilities to fulfill the Scope of Work?	10 points
2. Does the offeror have staff with knowledge of the 11 aspects listed below in the section 9.3.1?	20 points
3. Project plan – Does the proposed approach and detailed activities and timeline fulfill the requirements of executing the Scope of Work effectively and efficiently?	10 points
<b>Subtotal Points-Management Approach</b>	<b>40 points</b>
<b>Past Performance</b>	
1. Does the organization have a good track record in conducting similar work as the scope of work?	
<b>Subtotal Points-Past Performance</b>	<b>10 points</b>
<b>Total Points</b>	<b>100 points</b>

## 5. Instructions for the Preparation of Cost/Price Proposals

### 5.1 Cost/Price Proposals

Cost/Price proposals shall be submitted as a separate file 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 firm-fixed price awards. Offerors shall complete the template including as much detailed information as possible.

Where applicable, offerors should include Sales Tax (G/S ST) as separate lines on the invoice (if applicable). PREIA will provide GST and customs exemption slip instead of money for GST and customs amount to the supplier as based on the Strategic Objective Grant Agreement (SOGA) between Islamic Republic of Pakistan

and United States of America USAID is exempted of paying GST and customs on all purchases. Basis of Award

## **5.2 Best Value Determination**

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

DAI 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.**

## **5.3 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.
2. Evidence of a DUNS number (explained below and instructions contained 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 and 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.

## **6. Inspection & Acceptance**

The designated DAI Project Manager will inspect from time to time the services being performed 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 Chief of Party as a result of such inspection.

## **7. Compliance with Terms and Conditions**

### **7.1 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.

### **7.2 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> and <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.

#### **7.1 Data Universal Numbering System (DUNS) (if applicable)**

There is a **mandatory** requirement for your organization to provide a DUNS number to DAI. The Data Universal Numbering System is a system developed and regulated by Dun & Bradstreet (D&B) that assigns a unique numeric identifier, referred to as a "DUNS number" to a single business entity. Without a DUNS number, 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. The determination of a successful offeror/applicant resulting from this RFP/RFQ/RFA is contingent upon the winner providing a DUNS number to DAI. Offerors who fail to provide a DUNS number 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 DUNS number 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 DUNS number, see Attachment D - Instructions for Obtaining a DUNS Number - DAI'S Vendors, Subcontractors

For those not required to obtain a DUNS number, see Attachment E: Self Certification for Exemption from DUNS Requirement

#### **7.2 Vetting Requirements (if applicable)**

Pursuant to AIDAR 752.204-71, all recipients of DAI Pakistan awards above \$25,000 must comply with vetting requirements of all key individuals under the given award. No cash or in-kind disbursements will be provided until the recipient organization and all key individual(s) under the organization have passed vetting. The purpose of vetting is to mitigate the risk that USAID funds and other resources do not, even inadvertently provide support or benefit individual or entities that are terrorists, supporters of terrorists or affiliated with terrorists.

### **8. Procurement Ethics**

Neither payment nor preference shall be made by either the Offeror, or by any DAI staff, in an attempt to affect the results of the award. DAI treats all reports of possible fraud/abuse very seriously. Acts of fraud or corruption will not be tolerated, and DAI employees and/or subcontractors/grantees/vendors who engage in such activities will face serious consequences. Any such practice constitutes an unethical, illegal, and corrupt practice and either the Offeror or the DAI staff may report violations to the Toll-Free Ethics and Compliance Anonymous Hotline at +1 855-603-6987, via the DAI website, or via email to [FPI\\_hotline@dai.com](mailto:FPI_hotline@dai.com). DAI ensures anonymity and an unbiased, serious review and treatment of the information provided. Such practice may result in the cancellation of the procurement and disqualification of



the Offeror's participation in this, and future, procurements. Violators will be reported to USAID, and as a result, may be reported to the U.S. Department of Justice to be included in a Restricted Parties list, preventing them from participating in future U.S. Government business.

"USAID/Pakistan has, in cooperation with the USAID Office of Inspector General, established the Anti-Fraud Hotline to provide an avenue for the reporting of fraud, waste, and abuse which may be associated with USAID funded projects in Pakistan. Complaints are handled with complete confidentiality and individuals are encouraged to report when corruption, fraud, waste or abuse may exist in the USAID/Pakistan projects. Reports can be filed anonymously via the easy-to-use Hotline (toll free number 0800 84700); e-mail at [complaints@anti-fraudhotline.com](mailto:complaints@anti-fraudhotline.com); fax at 021-35390410; postal address at 5-C, 2nd Floor Khayban-e-Ittehad, Phase VII, DHA, Karachi. Pakistan and on the website [www.anti-fraudhotline.com](http://www.anti-fraudhotline.com).

Offerors must provide full, accurate and complete information in response to this solicitation. The penalty for materially false responses is prescribed in Section 1001 of Title 18 of the United States Code.

In addition, DAI takes the payment of USAID funds to pay Terrorists, or groups supporting Terrorists, or other parties in exchange for protection very seriously. Should the Terrorist, groups or other parties attempt to extort/demand payment from your organization you are asked to immediately report the incident to DAI's Ethics and Compliance Anonymous Hotline at the contacts described in this clause.

By submitting an offeror, offerors certify that they have not/will not attempt to bribe or make any payments to DAI employees in return for preference, nor have any payments with Terrorists, or groups supporting Terrorists, been attempted.

## **9. Attachments**

### **9.1 Attachment A: Scope of Work (SOW) for Development of Institutional Strategy and Implementation Plan for TDAP**

#### **9.1.1 Introduction**

The USAID funded Pakistan Regional Economic Integration Activity (PREIA) seeks proposals for the scope mentioned subsequently in the sections below.

PREIA is a USAID funded project to support the Government of Pakistan's (GoP) and the private sector to improve Pakistan's competitiveness in international markets and, ultimately, increase the country's trade and transit volumes. The three goals of PREIA are:

- Improved Business Enabling Environment;
- Improved Regional Trade and Transit Facilitation by Customs; and
- Improved Regional Business to Business (B2B) Linkages.

To this effect PREIA works and coordinates with GoP departments (including Ministry of Commerce, Ministry of Communication, Pakistan Customs) and private sector trade bodies including chamber of commerce and industries and sector specific associations to maintain alignment with national policy objectives.

#### **9.1.2 Background**

Trade Development Authority of Pakistan (TDAP) is a national export promotion and trade development organization of Ministry of Commerce, Government of Pakistan. It is tasked by TDAP Act 2013 to promote and develop sustainable supply chains for globally competitive exports in consultation with public and private stakeholders. DAI seeks the consultancy services of entities or consortium of entities to:

1. develop comprehensive sectoral analysis focused on increasing total exports, diversifying Pakistan's export portfolio for resiliency against global economic shocks, and improved integration in global and regional value chains; and
2. leveraging the sectoral and export analysis, develop an Institutional/ Organizational Development Strategy for Trade Development Authority of Pakistan covering 48 mandated functions in the Trade Development Authority of Pakistan Act 2013.

#### **9.1.3 Scope & Objectives:**

The scope is broadly divided into development of export strategy for Pakistan; and to support the 10-year institutional development strategy for TDAP.

1. Comprehensive Sectoral Analysis of Pakistan's exports
  - Evidence based analysis of exports of Pakistan, generally and sectoral analysis, specifically
  - Identification and roadmap of potential sectors to exponentially increase exports in next 05 years
  - Strengths, weaknesses, opportunities and threats
2. Institutional Development Strategy for TDAP

The Strategy document, based on the international best practices followed by most effective Trade Promotion Organizations (TPO) across the globe, will serve as a reference document for the TDAP Sectoral, International Markets Development Divisions and Trade Facilitation Division on the following aspects related to their sectors and geographical regions:

- i. Policy & Planning
- ii. Supply chain development & Product Diversification
- iii. Market Development & Diversification
- iv. International Marketing
- v. Awareness and Capacity Building
- vi. Research & Development
- vii. Stakeholder Consultation
- viii. Coordination with Trade Missions abroad
- ix. Trade Facilitation
- x. Reward & Recognition
- xi. Support Services

The 11 broad areas, as indicated above, shall form the basic structure of the document however the Consultants will be at liberty to propose any new areas or methodology that shall achieve the desired objectives and results. The Strategy should aim to provide:

- In depth analysis, leveraging organizational and legal gap assessments of the mandated functions of the organization in comparison with the other trade development and promotion agencies based upon learning and challenges in implementation of the strategy
- Identify and prioritize major focus areas for TDAP to achieve the sectoral targets
- Identify challenges, resource gap both in terms of HR, Finances etc. and suggest ways and means to achieve set objectives
- Evaluate the present marketing tools employed by the Organization and suggest any new technology tools for participation in virtual exhibitions, in line with international best practices
- Identify priority action areas within the given mandate for the organization in the given resources and function wise implementation plan
- Identify measures to enhance TDAP's capacity to promote and develop cross border eCommerce.
- To design appropriate systems for Monitoring, Evaluation and Reporting Mechanism aligned with identified strategic priorities
- Indicate possible performance targets to be measured periodically
- Develop an Action Plan for the implementation of 10 Year institutional strategy with clearly identified milestones and critical path

#### **9.1.4 Proposed steps:**

##### **Step I: Planning**

- Consultations with PREIA, TDAP and other stakeholders identified to develop the implementation plan for the consultancy;
- Development and finalization of assessment, analytical approach and tools.
- Finalize action plan for assessments and analysis
- Develop final deliverable outline for PREIA's approval

##### **Step II: Sector wise analysis of Pakistan's exports**

- Conduct secondary / primary research
- Identification of potential/prioritized Export Sectors of Pakistan

- Analysis of selected high potential sectors (goods and services) for global and regional supply chain development & export diversification
- Develop comprehensive document detailing SWOT to Pakistan's exports in international markets

### Step III: Development of Institutional Strategy for TDAP

- Review the organizational and legal capacity, including financial, Human Resource, and administrative systems against its mandate.
- Identified Institutional Strategy, key result areas; and Implementation Plan with recommendations including those pertaining to:
  - Analysis of Pakistan's Exports - Policy & Planning
  - Identification of challenges & resource gap - Awareness & Capacity Building
  - Prioritization of major focus areas - Research & Development
  - Mechanism of Consultation & Coordination
  - Formulation of Trade Facilitation as per international best practices
  - Promotional & Marketing Strategies – other than exhibition and delegation
  - Development of Evaluation & Reporting mechanism – Reward & Recognition
- Consult stakeholders on the draft Institutional Strategy

### Step IV: Finalization of Institutional Strategy

- Finalize the strategy
- Finalize Implementation Plan Final Approval of PREIA

#### 9.1.5 Provisional Time Period from the Start of the Contract and Deliverables

Timelines	Activity	Deliverables
Week: 1-4	<ul style="list-style-type: none"> <li>• <b>Planning</b></li> </ul>	i. Final assessment, analytical approach and tools ii. Action plan for assessments and analysis iii. final deliverable outline for PREIA's approval
Week: 5-8	<ul style="list-style-type: none"> <li>• <b>Sector wise analysis of Pakistan's exports and their supply chains</b></li> </ul>	First Draft
Week: 9-12	<ul style="list-style-type: none"> <li>• <b>Institutional Strategy for TDAP</b></li> </ul>	First Draft
Week: 13-14	<ul style="list-style-type: none"> <li>• <b>Finalization of Institutional Strategy</b></li> </ul>	Final Draft

#### 9.1.6 Base of Operations

Pakistan

## 9.2 Attachment B: Proposal Cover Letter

[On Firm's Letterhead]

<Insert date>

TO: Click here to enter text.  
Development Alternatives, Inc.

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.. Our attached proposal is for the total price of <Sum in Words (\$0.00 Sum in Figures) >.

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.

Company Seal/Stamp:

### 9.3 Attachment C: Price Schedule

Item Number	Deliverable Title	Description/Specifications	Quantity	Unit Price	Total Price
1a					
1b					
1c					
2	Click here to enter text.				
3	GST (if applicable)				
<b>GRAND TOTAL IN</b> Click here to enter text.					
GRAND TOTAL IN US DOLLARS (USD)					

**Delivery Period:** Click here to enter text.

## 9.4 Attachment D: Instructions for Obtaining a DUNS Number

### For DAI'S Vendors, Subcontractors

**Note: There is a Mandatory Requirement for your Organization to Provide a DUNS number 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 DUNS number 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 DUNS number 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 DUNS number; 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 A DUNS NUMBER.**

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

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#### **Background:**

#### **Summary of Current 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 users include the U.S. Government, European Commission and the United Nations. The DUNS number will be used to better identify related organizations that are receiving U.S. federal funding, and to provide consistent name and address data for electronic application systems.

**Instructions detailing the process to be followed in order to obtain a DUNS number for your organization begin on the next page.**

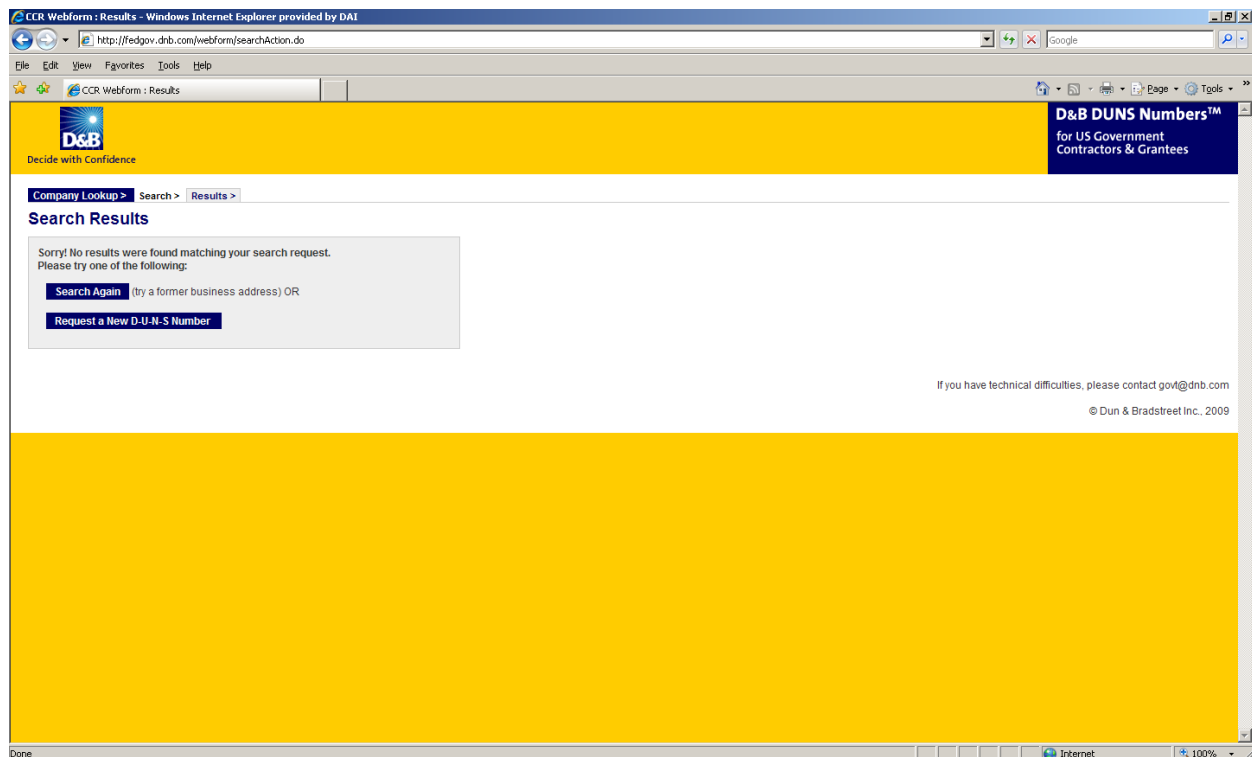
## THE PROCESS FOR OBTAINING A DUNS NUMBER IS OUTLINED BELOW:

1. Log on to the D&B (Dun & Bradstreet) DUNS registration website to begin the process of obtaining a DUNS number free of charge.

<http://fedgov.dnb.com/webform/index.jsp>

Please note there is a bar on the left for Frequently Asked Questions as well as emails and telephone numbers for persons at Dun & Bradstreet for you to contact if you have any questions or difficulties completing the application on-line. DAI is not authorized to complete the application on your organization's behalf; the required data must be entered by an authorized official of your organization.

2. Select the Country where your company is physically located.
3. You will first be asked to search the existing DUNS database to see whether a DUNS number already exists for your organization/entity. Subcontractors/grantees who already have a DUNS number may verify/update their DUNS records.
4. Potential DAI subcontractors/vendors/grantees who do not already have a DUNS number will be shown the screen below. To request a new DUNS Number, the "Request a New D-U-N-S Number" button needs to be selected.





5. Enter the information regarding your organization listed on the next three screens. (See screen shots below.) Make sure you have the following information available (in English) prior to beginning the process of entering this section in order to ensure successful registration.
  - Legal Business Name (commas are allowed, periods are not allowed)
  - Address
  - Phone
  - Name of Owner/Executive
  - Total Number of Employees
  - Annual Sales or Revenue (US Dollar equivalent)
  - Description of Operations
6. Note that some fields are Optional, however all other fields must be completed to proceed further with the application process. For example, all applicants must complete the Organization Information sections. The Company Name and Physical Address fields are self-populated based on information previously entered during the initial DUNS search. The question marks to the left of the field provide additional information when you click on them.

CCR Webform: New Duns Number Request. - Windows Internet Explorer provided by DAI

http://fedgov.dnb.com/webform/newReq.do?hdnCompanyNumber=18&browser=&hdnCompanyName=&hdnAddress=&hdnCity=&hdnState=&hdnZip=&hdnCountry=&hdnDuns=&hdnTradeStyleName=&hdnComp...

File Edit View Favorites Tools Help

CCR Webform: New Duns Number Request.

D&B DUNS Numbers™  
for US Government  
Contractors & Grantees

D-U-N-S Number Request> Search> Enter Your Company Information>

### Request for New D-U-N-S Number

Any affiliated companies at the same address, will not be affected. If there are affiliated companies at the same address, please specify in the Notes section.

Complete the information below to obtain a new D-U-N-S Number for your company's physical location.

Note: All fields are required unless otherwise indicated.

**Company Name**

? Legal Name

? Legal Structure

? Tradestyle Name 1 (optional)

Tradestyle Name 2

Tradestyle Name 3

? Phone Number of Business

**Physical Address**

? Street

? City

? State

? Zip Code + 4/Postal Code

Country

**Mailing Address (optional)** ☐ Same as Physical Address

? Street/ P.O. Box

City

7. You must select the legal structure of your organization from the pull down menu. To assist you in selecting the appropriate structure that best represents your organization, a brief description of the various types follows:
  - **Corporation** – A firm that meets certain legal requirements to be chartered by the state/province in which it is headquartered by the filing of articles of incorporation. A corporation is considered by law

to be an entity separate and distinct from its owners. It can be taxed; it can be sued; it can enter into contractual agreements.

- **Government** - central, province/state, district, municipal and other U.S. or local government entities. Includes universities, schools and vocational centers owned and operated by the government.
- **Limited Liability Company (LLC)** - This is a type of business ownership combining several features of corporation and partnership structures. It is designed to provide the limited liability features of a corporation and the tax efficiencies and operational flexibility of a partnership. Its owners have limited personal liability for the LLC's debts and obligations, similar to the status of shareholders in a corporation. If your firm is an LLC, this will be noted on the organizations registration and licensing documents.
- **Non-profit** - An entity which exists for charitable reasons and is not conducted or maintained for the purpose of making a profit. Any money earned must be retained by the organization, and used for its own expenses, operations, and programs. Most organizations which are registered in the host country as a non-governmental organization (NGO) rather than as a commercial business are non-profit entities.

**Community based organizations, trade associations, community development councils, and similar entities which are not organized as a profit making organization should select this status, even if your organization is not registered formally in country as an NGO.**

- **Partnership**- a legal form of operation in which two or more individuals carry on a continuing business for profit as co-owners. The profits and losses are shared proportionally.
  - **Proprietorship**-These firms are owned by one person, usually the individual who has day-to-day responsibility for running the business. Sole proprietors own all the assets of the business and the profits generated by it.
8. One of the most important fields that must be filled in is the Primary SIC code field. (See screen shot below.) The Primary Standard Industrial Code classifies the business' most relevant industry and function.

CCR Webform: New Duns Number Request - Windows Internet Explorer provided by DAI

http://fedgov.dnb.com/webform/newReq.do?hdncompanynumber=1&browser=8&hdnCompanyName=8&hdnAddress=8&hdnCity=8&hdnState=8&hdnZip=8&hdnCountry=8&hdnDuns=8&hdnTradeStyleName=8newComp

Street/ P.O. Box  
City  
State  
Zip Code + 4/Postal Code  
Country: Select one

**Organization Information**

Executive Name  
Title: Select one  
Primary SIC code  
Description of Operations  
Socioeconomic Data: Select one  
Number of Employees(includes owners, partners, and/or officers)  
Annual Sales or Revenue

**Parent Organization (optional)**

Name  
Street  
City  
State  
Zip Code + 4/Postal Code  
Country: Select one

**Notes (optional)**

Submit Your Request

If you have technical difficulties, please contact gov@dnb.com

9. If you are unsure of which SIC Code your organization's core business falls under, please refer to the following website: <http://www.osha.gov/oshstats/sicser.html>

Standard Industrial Classification (SIC) System Search - Windows Internet Explorer provided by DAI

http://www.osha.gov/pls/lnis/sicsearch.html

UNITED STATES DEPARTMENT OF LABOR

OSHA

OSHA QuickTakes Newsletter RSS Feeds Print This Page Text Size

Occupational Safety & Health Administration We Can Help

Home Workers Regulations Enforcement Data & Statistics Training Publications Newsroom Small Business OSHA

**STATISTICS & DATA | SIC MANUAL**

This page allows the user to search the 1987 version SIC manual by keyword, to access descriptive information for a specified 2,3,4-digit SIC, and to examine the manual structure.

Enter a SIC CODE:

Enter the search keyword(s):

Submit Clear

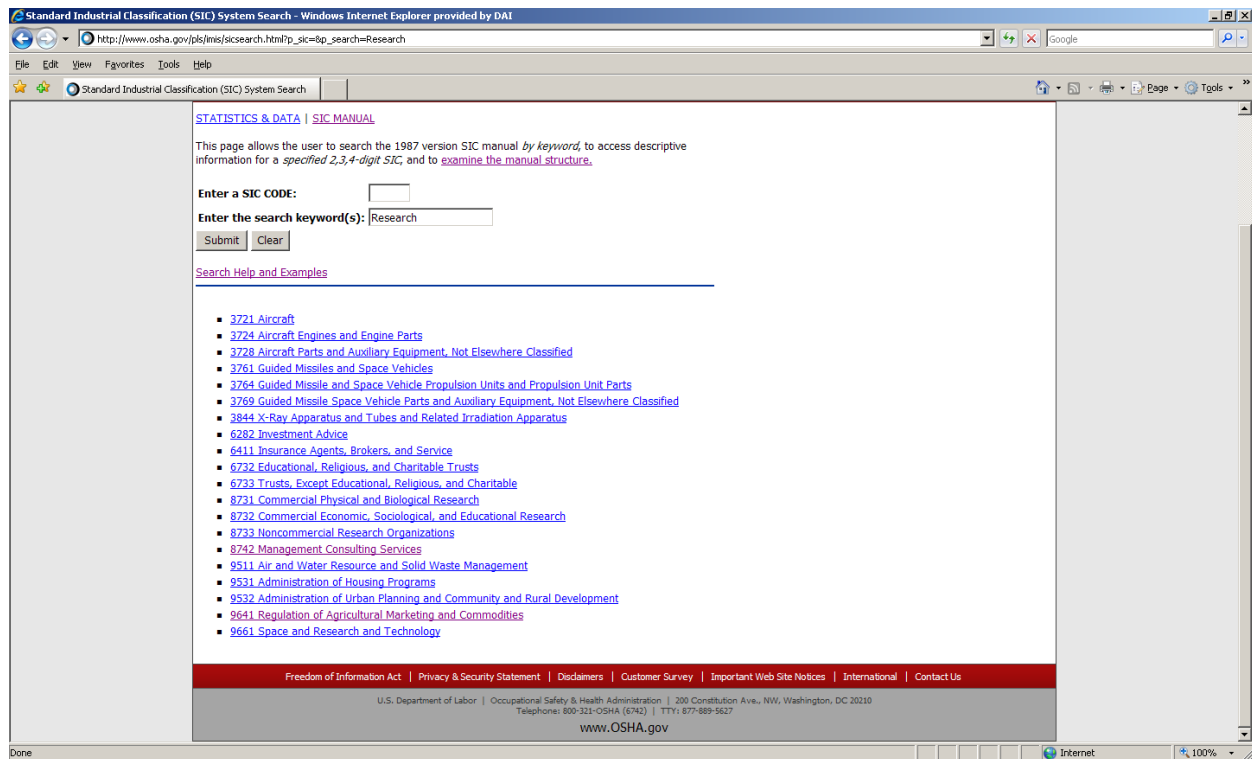
[Search Help and Examples](#)

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U.S. Department of Labor | Occupational Safety & Health Administration | 200 Constitution Ave., NW, Washington, DC 20210  
Telephone: 800-321-OSHA (6742) | TTY: 877-689-5627

www.OSHA.gov

You will need to enter certain keywords to bring up the potential SIC Codes. In the case above, “Research” was entered as the keyword, and resulted in the following:



PLEASE NOTE: Many of the DAI subcontractors and grantees fall under one of the following SIC codes:

**8742** Management Consulting Services

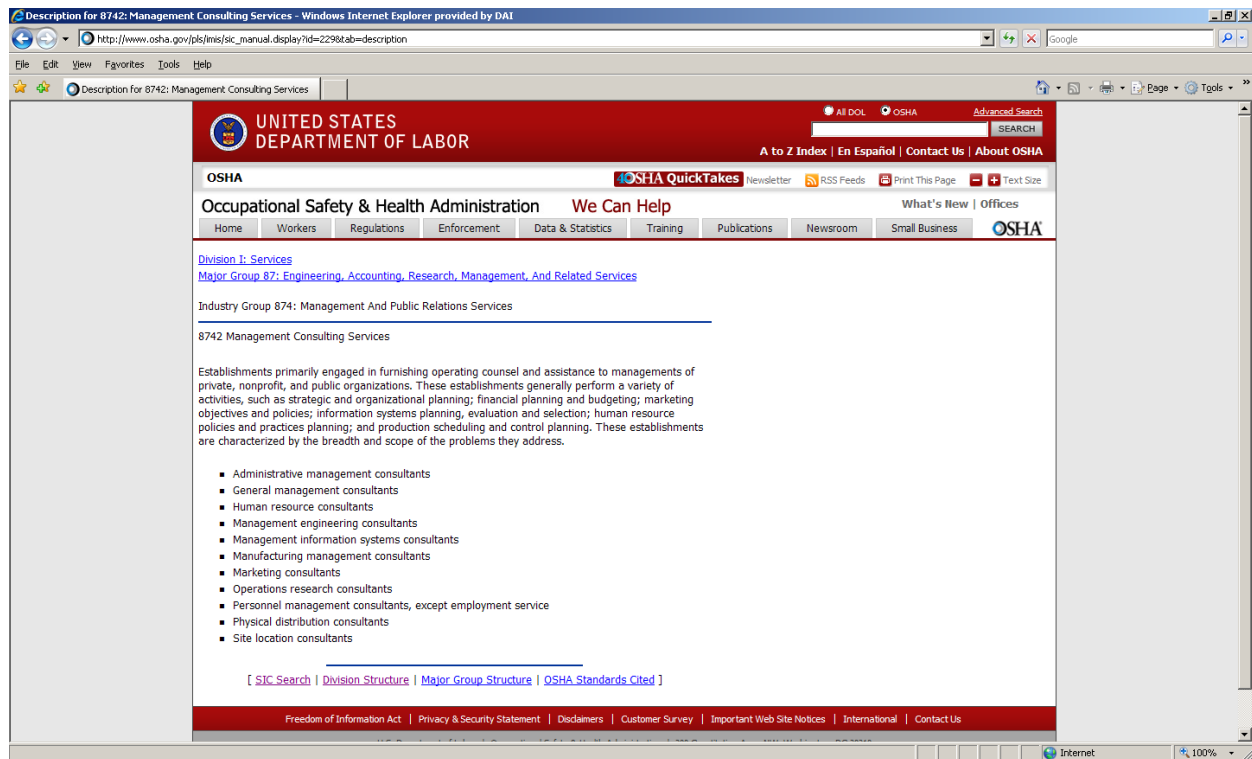
1542 General Contractors-Nonresidential Buildings, Other than Industrial Buildings and Warehouses or one of the codes within:

Industry Group 357: Computer And Office Equipment

Industry Group 355: Special Industry Machinery, Except Metalworking

Industry Group 356: General Industrial Machinery And Equipment

Industry Group 359: Miscellaneous Industrial And Commercial



10. Description of Operations- Enter a brief description of the primary services you provide the example below, “agricultural technical assistance” was chosen as the primary function of the business.

The screenshot shows the "CCR Webform: New Duns Number Request" form in a Windows Internet Explorer browser. The URL is "http://fedgov.dnb.com/webform/newReq.do?hdncompanynumber=1&browser=&hdnCompanyName=&hdnAddress=&hdnCity=&hdnState=&hdnZip=&hdnCountry=&hdnDuns=&hdnTradeStyleName=&newComp=". The form is divided into several sections: "Mailing Address (optional)", "Organization Information", "Parent Organization (optional)", and "Notes (optional)". The "Mailing Address" section includes fields for Street/P.O. Box, City, State, Zip Code + 4/Postal Code, and Country. The "Organization Information" section includes fields for Executive Name, Title, Primary SIC code, Description of Operations (set to "Agricultural Technical Assistance"), Socioeconomic Data (set to "No special Ownership Status"), Number of Employees (set to "10"), and Annual Sales or Revenue (set to "USD 500,000"). The "Parent Organization" section includes fields for Name, Street, City, State, Zip Code + 4/Postal Code, and Country. The "Notes" section is a text area. A "Submit Your Request" button is located at the bottom of the form.

11. The Annual Sales or Revenue figure should be provided in USD (US Dollar) equivalent.
12. Once all of the fields have been completed, click on “Submit Your Request” to be taken to the Verification page.
13. Note: Representative (Principal, Owner or Officer) needs to verify and provide affirmation regarding the accuracy of the data under criminal or civil penalties as per Title 18, Section 1001 of the US Criminal Code.
14. Once “Yes, Continue” button is clicked, the registration application is sent to D&B, and a DUNS number should be available within 24-48 hours. DUNS database can be checked in 24-48 hours by entering the Business Information in the Search window – which should now display a valid result with the new DUNS number for the entity.

CCR Webform : verification page - Windows Internet Explorer provided by DAI

http://fedgov.dnb.com/webform/NewDunsRequest.do

File Edit View Favorites Tools Help

CCR Webform : verification page

D&B DUNS Numbers™  
for US Government  
Contractors & Grantees

D-U-N-S Number Request > Search > Enter Your Company Information > Verify Information Page >

**Verification Page**

Company Name

Legal Name DNB TEST, INC

Phone Number of Business 20-555-1212

Physical Address

Street 100 Jalan Abdul Rahman

City Kabul

State

Zip Code + 4/Postal Code

Country AFGHANISTAN

Organization Information

Executive Name Mohammad #

You affirm that you are a principal, owner or officer of the entity for which you are submitting proposed information and/or changes and that you are properly authorized to submit these changes. You also agree not to knowingly provide any false or misleading information to D&B. Knowingly providing false or misleading information may result in criminal or civil penalties as per [Title 18, Section 1001 of the US Criminal Code](#), and may negatively impact the status of the D&B report maintained on this company.

This also includes the use of a Shelf Corporation. D&B defines a Shelf Corporation as one that exhibits either of the following characteristics: (1) An aged corporation where no prior business activities could be confirmed or (2) An aged corporation that was revoked, dissolved or went to a dormant status, and is subsequently reinstated and is under new control. It is D&B's policy that the historical business activity of a Shelf Corporation, if any, will not be factored into the determination of such Shelf Corporation's start date. As such, any individual who attempts to misrepresent the start date of their business through the use of a Shelf Corporation or any other means is immediately put on information alert status or higher-risk status. In addition, the criminal penalties mentioned above may apply.

Done

Internet 100%

## 9.5 Attachment E: Self Certification for Exemption from DUNS Requirement

### Self-Certification for Exemption from DUNS Requirement For Subcontractors and Vendors

Legal Business Name:

Physical Address:

Physical City:

Physical Foreign Province (if applicable):

Physical Country:

Signature of Certifier

Full Name of Certifier

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 DUNS number, 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.

### 9.6 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 the evaluation committee.

#	Project Title	Description of Activities	Location Province/ District	Client Name/Tel No	Cost in US\$	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									



## 9.7 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 an 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.

## 9.8 Attachment J: 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 labeled as Volume I and Volume II respectfully.
- ☐ CVs of proposed key staff who would be assigned to the project
- ☐ 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 DUNS Number OR Self Certification for Exemption from DUNS Requirement
- ☐ Past Performance (*use template in Attachment F*)