
B-9 Financial Street, Xicheng District
Beijing 100033, China

Invitation for Bid (IFB)

Subscription of Independent Research on IT Market and Vendors

IFB No. SR 274514217

The Asian Infrastructure Investment Bank (AIIB) would like to invite Bids from eligible and qualified Bidders for the supply of **Subscription of Independent Research on IT Market and Vendors**, as outlined in this document. Bids must be submitted to the below email address in both PDF format and DOCX format (with the same but editable content) before 23:59, Sep.18, 2019 (Beijing time).

Contact information:

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Corporate Procurement Unit
Email Address: it.procurement@aiib.org
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100033 Beijing, China

Annex A – Instructions to Bidders (ITB)
Annex B – Data Sheet (DS)
Annex C – Eligibility Requirements
Annex D – Purchaser's Requirements
Annex E – Bid Forms
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Annex A. Instructions to Bidders (ITB)

1. Definition

The following terms are defined for the purpose of this Invitation for Bid (IFB):

- **“Bidding Document”** means the IFB and its Annexes and any Addenda issued in accordance with ITB8.
- **“General Services”** is defined in AIIB’s Directive on Corporate Procurement (accessible at www.aiib.org). For the purpose of this Bidding, “General Services” is referred to as the **“Services”** in short.
- **“Goods”** is defined in AIIB’s Directive on Corporate Procurement (accessible at www.aiib.org).
- **“Supplier”** is defined in AIIB’s Directive on Corporate Procurement (accessible at www.aiib.org).
- **“Purchaser”** means the Asian Infrastructure Investment Bank or AIIB.
- **“Day”** means calendar day unless otherwise specified.
- **“Evaluated Price”** means the Bid price confirmed or adjusted during the Bid evaluation in accordance with ITB 22. The Evaluated Price is only for the purpose of comparing financial Bids.

2. Compliance

These instructions in this Annex shall be read in conjunction with the rest of the Bidding Document. Bidder is expected to comply with all instructions and requirements in this Bidding Document. Noncompliance may result in the rejection of the Bid.

3. Contract

The best Bid that represents the optimal balance of quality and cost of the Services shall be the basis for contract negotiations with the Supplier that has submitted the Bid. The General Terms and Conditions (GTC) are in Annex F. The Supplier is not expected to alter any content in the GTC.

4. Eligible Bidders

A Bidder must meet the eligibility requirements in Annex C, and make declaration in Annex E.

5. Prohibited Practices

AIIB requires all parties, including Suppliers and AIIB staff to observe the standards of integrity and ethics during the procurement, administration and implementation of corporate procurement contracts. AIIB acts in accordance with AIIB’s Policy on Prohibited Practices in connection with a prohibited practice (as defined in said Policy) and AIIB’s Code of Conduct for Bank Personnel, and AIIB’s Code of Conduct for Board Officials.

6. Conflict of Interest

AIIB may declare a party ineligible for entering a contract with AIIB if AIIB decides there would be a “conflict of interest” in that party Bidding for or executing the contract. For the purposes of corporate procurement, the Bank considers a conflict of interest to be a situation in which a party has interests that could improperly influence, or be perceived to improperly influence, that party’s performance of its official duties, responsibilities, or contractual obligations or compliance with applicable laws and regulations or that such conflict of interest may contribute to or constitute a prohibited practice under AIIB’s Policy on Prohibited Practices. Bidders have

an obligation to disclose any situation of actual or potential conflict of interest. Failure to disclose such situations may lead to the disqualification of the Bidder or the termination of its contract.

7. Clarification of Bidding document and Pre-bid Conference

- 7.1. A prospective Bidder requiring any clarification of the Bidding document shall contact AIIB's Representative at the address provided in the cover letter. AIIB will respond in writing to any request for clarification, provided that such request is received not less than seven (7) days before the deadline for submission of Bids. Should AIIB deem it necessary to amend the Bidding document as a result of a clarification, it shall do so following the procedure under ITB8. AIIB has no obligation to respond to all requests for clarifications.
- 7.2. The Bidder shall check Annex B whether the Bidder is invited to send a designated representative to attend a pre-bid conference. The purpose of the meeting will be to clarify issues and to answer questions on any matter related to the Bidding Document. The pre-bid conference minutes containing questions and answers will be transmitted promptly to all Bidders who have acquired the Bidding Document directly from AIIB. The minutes will not identify the source of the questions. Any modification to the Bidding Document that may become necessary as a result of the pre-bid conference shall be made by AIIB through an addendum to the Bidding Document pursuant to ITB8. Nonattendance at the pre-bid meeting will not be a cause for disqualification of a Bidder.

8. Amendment of Bidding document

At any time prior to the deadline for submission of the Bids, AIIB may amend the Bidding document by issuing addenda. Any addendum issued shall be part of the Bidding document and shall be communicated in writing to all who have obtained the Bidding document directly from AIIB. To give prospective Bidders reasonable time in which to take an addendum into account in preparing their Bids, AIIB may, at its discretion, extend the deadline for the submission of the Bids.

9. Cost of Bidding

The Bidder shall bear all costs associated with the preparation and submission of its Bid (including preparation of the bid, attendance at any pre-bid conference, on-site visit or oral presentation meeting) regardless of the outcome of the Bidding process.

10. Language of Bid

The Bid, as well as all correspondence and documents relating to the Bid shall be in English. Supporting documents and printed literature that are part of the Bid may be in another language provided they are accompanied by an accurate translation of the relevant passages in English in which case, for purposes of interpretation of the Bid, such translation shall govern.

11. Preparation of Bid

- 11.1 The Bidders should examine all terms and instructions included in the solicitation documents. Failure to provide all requested information will be at Bidder's own risk and may result in rejection of Bidder's bid.
- 11.2 If the Bidder wishes to propose alternatives or equivalents in Annex D, the Bidder must demonstrate that any such proposed change is equivalent or superior to AIIB's established Requirements. Acceptance of such changes is at the sole discretion of AIIB.

- 11.3 The submission letters in Annex E, should be signed by authorized representative of the Bidders. The authorization shall be in the form of a written power of attorney accompanying the Bid or in any other form demonstrating that the representative has been duly authorized to sign. All the should-be signed documents received without signatures may be rejected.
- 11.4 The Annex F, AIIB's General Terms and Conditions shall be incorporated to the final version of the Contract Form. Bidder is expected to accept the General Terms and Conditions and advise if any deviation or proposed amendment to the Bank along with the submission of proposals.
- 11.5 The Bidders shall take appropriate steps to ensure that neither the Bidders nor its Personnel is placed in a position where, in the reasonable opinion of AIIB, there is or may be an actual or potential conflict between the pecuniary or personal interests of the Bidders and performance of the Bidders' obligations. The Bidders shall disclose to AIIB full particulars of any such conflict of interest that may arise.
- 11.6 A proposed bidding schedule for the goods/general service/works supply is in Annex B.

12. Bid Prices

The prices quoted by the Bidder in the financial Bid shall conform to the requirements specified below.

- a) All items in the Technical Bid must be listed and priced separately in the Financial Bid. If any item listed in the Technical Bid but not priced in the Financial Bid, the price of the item shall be assumed to be included in the total price of the Bid.
- b) The price to be quoted in the Financial Bid Submission Letter shall be the total price of the Bid.
- c) The price shall include all taxes, customs duties and other levies payable by the Bidder.
- d) Prices quoted by the Bidder shall be fixed during the Bidder's performance of the Contract and not subject to variation on any account.

13. Currencies of Bid

The Bidder may express its Bid price in any fully convertible currency or in Chinese Yuan.

14. Bid Validity

Bids shall remain valid for the period as indicated in Annex B after the Bid submission deadline date. In exceptional circumstances, prior to the expiration of the Bid validity period, AIIB may request Bidders to extend the period of validity of their Bids. The request and the responses shall be made in writing. A Bidder may refuse the request without breaching its Bid-Securing Declaration. A Bidder granting the request shall not modify its Bid.

15. Submission of Bids

- 15.1 Bidders' Technical Bids, in electronic version, must be submitted simultaneously by the mailbox designated in the cover letter. Technical Bids shall indicate the name and address of the Bidder.
- 15.2 Both Technical Bids and Financial Proposals must be submitted in both PDF format and DOCX format (with the same but editable content). The two attached documents must be clearly titled with either "**Tec.** – IFB XXX- *{abb.name of the Bidder}*" or "**Fin.** –IFB XXX- *{abb.name of the Bidder}*". No hard copy will be accepted.

15.3 Bidders are responsible for ensuring that AIIB has received their bids by the due date and time.

16. Late Bid

Bids must be received by the date and time stipulated in Annex B. The deadline of Bid due date and time (Beijing time) indicates the very time when Bidder sends out his bids, which will be recorded by the mailbox. Bids received by AIIB after the due date and time may be rejected.

17. Opening of Bids

The Procurement Task Team (PTT) of AIIB shall conduct the Technical Bid opening immediately after the deadline for submission of Bids. The Financial Bid shall remain unopened until Technical Evaluation completion.

18. Evaluation of Technical Bids

AIIB shall evaluate the Technical Bids on the basis of their responsiveness to AIIB's Requirement in Annex E, applying the evaluation criteria specified in Annex B. AIIB's determination of the responsiveness of a Bid is to be based on the contents of the Bid itself. Each responsive Technical Bid shall be given a technical score. Any Bid that fails to achieve the minimum qualifying technical score as indicated in Annex B shall be rejected at this stage.

19. Evaluation of Financial Bids

19.1. AIIB shall review the Financial Bids to check if they are complete (i.e. whether Bidders have priced all items of the corresponding Technical Bids). For omissions of any items, AIIB shall assume the cost for such items are already included in the total price of the Financial Bid.

19.2. AIIB shall correct computational errors in the Financial Bid.

- a) 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, unless in the opinion of AIIB there is an obvious misplacement of the decimal point in the unit price, in which case the total price as quoted shall govern and the unit price shall be corrected;
- b) If there is an error in a total corresponding to the addition or subtraction of subtotals, the subtotals shall prevail and the total shall be corrected.

19.3. AIIB shall determine the Evaluated Price for each Financial Bid based on the Financial Bid.

19.4. For the evaluation purposes, the currency(ies) of the financial Bid shall be converted into US Dollars using AIIB's daily currency exchange rates issued on the day of submission date indicated in Annex B.

19.5. The Financial Bid that has the lowest Evaluated Price shall receive the maximum score of 100 Points. The score for each of the other Financial Bid is inversely proportional to its Evaluated Price and shall be computed as follows:

$$S_f = 100 \frac{F_l}{F}$$

Where:

S_f is the financial score of the Financial Bid being evaluated

F_l is the lowest Evaluated Price

F is the Evaluated Price of the Financial Bid being evaluated

20. Comparison of Bids

20.1. The combined total score of each Bidder's Bid shall be computed as follows:

$$S = W_t \times S_t + W_f \times S_f$$

Where:

S is the combined total score

W_t is the weight of the technical score

S_t is the technical score

W_f is the weight of the financial score

S_f is the financial score

20.2. For this bidding, the weight of the technical score and the weight of the financial score are specified in Annex B.

20.3. The points from the technical evaluation and the financial bid will be summed to determine the total points for each Bidder. The combined total scores shall be ranked in a descending order.

20.4 AIIB reserves the right to conduct the Best and Final Offer (BAFO) if in AIIB's exclusive determination such procedure is appropriate. However, AIIB's right to do a BAFO as herein reserved should not be interpreted to allow Bidder to introduce changes or request negotiation of items not specifically addressed by AIIB in the BAFO. Bidders are forewarned that they must make their best offer at the time of their Bids.

21. Confidentiality

Information relating to the evaluation of Bids, and recommendation of contract award, shall not be disclosed to Bidders or any other persons not officially concerned with such process until notification of the Contract award. Any attempt by a Bidder to influence AIIB in the evaluation of the Bids or Contract award decisions may result in the rejection of its Bid.

22. Clarification of Bids

To assist in the evaluation of the Bids, AIIB may, at its discretion, ask any Bidder for a clarification of its Bid. AIIB's request for clarification and the response shall be in writing. No change in the prices or substance of the Bid shall be sought, offered, or permitted, except to confirm the correction of arithmetic errors discovered by AIIB in the evaluation of the Bids, in accordance with ITB19.

23. Post-qualification of the Bidder

AIIB shall determine, based on the qualification criteria in Annex B, to its satisfaction whether the Bidder that is selected is qualified to perform the Contract satisfactorily. The determination shall be based upon an examination of the documentary evidence of the Bidder's qualifications submitted by the Bidder. An affirmative determination shall be a prerequisite for issuing an invitation to the Bidder to contract negotiation. A negative determination shall result in disqualification of the Bidder, in which event AIIB shall proceed to the next ranked Bidder and determine if the Bidder is qualified to be invited to contract negotiation.

24. AIIB's Right to Accept Any Bid, and to Reject Any or All Bids

AIIB reserves the right to accept or reject any Bid, and to annul the Bidding process and reject all Bids at any time prior to Contract award, without thereby incurring any liability to the Bidders.

25. Invitation to Contract Negotiation

Prior to the expiration of the period of Bid validity, AIIB shall invited the first ranked Bidder to contract negotiation. The award will be in effect only after acceptance by the selected Bidder of the updated Statement of Work. Upon completion of negotiations AIIB will promptly notify the unsuccessful Bidders.

26. Contract Award

26.1 At the same time as AIIB notifies the successful Bidder that its bid has been accepted, AIIB will invite the bidder to sign the final version of the Contract Form, incorporating all agreements between the parties.

26.2 Within seven (7) days after receiving the contract signed by the Bank, the successful Bidder shall sign and send back to AIIB.

26.3 The selected Bidder is expected to commence providing goods/services as of the date and time stipulated in Annex B.

26. 4 The AIIB reserves the right to publicly disclose contract award information, including but not limited to, name of company receiving the award, brief description of services, and contract award amount, for any contract award valued over US\$200,000. Bidders' bid and contractual documents will remain confidential and therefore not subject to disclosure.

27. Registration in Supplier Management System (SMS)

Prior to signing of Contract, the successful Bidder shall register in AIIB's Supplier Management System (SMS).

28. Performance Bond

28.1. The successful Bidder shall check Annex B whether the Contract requires performance bond. If it is required, then after the Bidder has signed the Contract and within the time period as specified in the Data Sheet, the successful Bidder shall furnish the Performance Bond in accordance with the Contract.

28.2. Failure of the successful Bidder to submit the Performance Bond after the Bidder has signed the Contract shall constitute sufficient grounds for the annulment of the Contract and execution of the Bid-Securing Declaration. In that event AIIB may the next ranked Bidder to Contract negotiation.

29. Conclusion of Bidding

After AIIB has received the signed Contract, and the performance bond if the performance bond is required, AIIB shall notify all other Bidders of the conclusion of the bidding in a Letter of Regret informing them that their Bids are not accepted.

Annex B. Data Sheet (DS)

ITB No.	Subject	Details								
7	Pre-bid Conference	There will be no pre-bid conference for this bidding.								
11	Proposed Bidding Schedule	▪ Bid Due Date and Time.....23:59, Sep 18, 2019 ▪ Oral Presentation..... In week of Sep 23, 2019 ▪ Anticipated AwardOct 18, 2019 ▪ Expected date of commencement..... Nov 1, 2019								
14	Bid Validity	180 calendar days								
18~20	Evaluation and Qualification Criteria	1.1. The technical Bids shall be evaluated using the following evaluation sheet. <table><tr><td>A. Firm Quality (see details below)</td><td>20 points</td></tr><tr><td>B. Proposal Quality (see details below)</td><td>80 points</td></tr><tr><td colspan="2"> </td></tr><tr><td>TOTAL</td><td>100 points</td></tr></table> A. FIRM QUALITY (20 Points) (i) Company/Business Unit Track Records (3 years) (10 points) (ii) Relevance of Reference Cases (10 points) B. PROPOSAL QUALITY (80 Points) (i) Responses to the Technical Requirements (50 points) (ii) Resource Fitness and Allocation Rationality (10 points) (iii) Clarify and Conformity of Proposal and Presentation (20 points) 1.2. The minimum technical score for qualifying a Technical Bid is 70 points	A. Firm Quality (see details below)	20 points	B. Proposal Quality (see details below)	80 points			TOTAL	100 points
A. Firm Quality (see details below)	20 points									
B. Proposal Quality (see details below)	80 points									
TOTAL	100 points									

		2. Comparison of Bids 2.1. The weight for Technical Bid is: 80% 2.2. The weight for Financial Bid is: 20%
	Currency Exchange Rate	By Bloomberg rate: https://www.bloomberg.com/markets/currencies/cross-rates

Annex C. Eligibility Requirements

All Bidders participating in AIIB's corporate procurement shall meet the eligibility requirements set forth in the AIIB's Policy on Corporate Procurement and Directive on Corporate Procurement.

Excerpt from Policy on Corporate Procurement:

"4. Eligibility

4.1. The Bank may procure goods, works, general services and consulting services from any country unless the Bank's Board of Directors decides otherwise. Any country excluded by the Board of Directors will be listed in a schedule that will be published alongside this Policy.

4.2. A party wishing to enter into a corporate procurement contract with the Bank must meet the qualification requirements required by the Bank for the contract.

4.3. The Bank may declare a party ineligible for a particular corporate procurement contract if the Bank decides there would be a "conflict of interest" in that party bidding for or executing the contract. For the purposes of corporate procurement, the Bank considers a conflict of interest to be a situation in which a party has interests that could improperly influence, or be perceived to improperly influence, that party's performance of its official duties, responsibilities, or contractual obligations or compliance with applicable laws and regulations or that such conflict of interest may contribute to or constitute a prohibited practice under the Bank's Policy on Prohibited Practices.

4.4. A party may be deemed ineligible for any corporate procurement contract if found to be in breach of the Bank's Policy on Prohibited Practices."

Excerpt from Directive on Corporate Procurement:

"3.8. Eligibility and Preventing Conflict of Interest

3.8.1. Individuals and legal entities currently under sanction by the Bank in accordance with the Policy on Prohibited Practice are not eligible to participate in the Bank's corporate procurement.

3.8.2. A Bidder or Consultant engaged by the Bank to prepare technical specifications in the bidding documents, or to assist in the preparation of bidding documents or evaluation criteria relating to an instance of Simplified Competitive Procurement or Full Competitive Procurement, is ineligible to bid for that instance of procurement.

3.8.3. A former member of Bank Personnel shall not be eligible for any instance of corporate procurement unless the Human Resources Department provides prior written approval to the Corporate Procurement Unit. Such written approval shall be required only for the first instance of proposed procurement unless the Human Resources Department specifies otherwise.

3.8.4. Former Bank Personnel shall not, for two years following their termination of employment with the Bank, be eligible for any instance of corporate procurement related to a matter in which they participated personally and substantially during their employment with the Bank, unless otherwise agreed by the President."

Annex D. Purchaser's Requirements

1. Background

Information Technology plays strategic enabler role to sustain, optimize and transform AIIB business operations. Following AIIB Lean principle, majority of IT solutions are acquired from the vendors on the IT market at global scale. The market scanning efficiency and vendor evaluation quality are heavily relying on the comprehensive, up-to-date and actionable insights and foresights on the extremely fast-changing IT market and vendors.

Currently, the market scan and vendor evaluation mainly rely on the knowledge from below sources that may introduce risks for IT procurement.

- Vendor-provided information that tends to be self-interested and/or misinterpretation without context
- Time-consuming internet search that may lack of depth, consistence and credibility
- Internal staff own previous experience that may not be that up-to-date and all-encompassing

In addition, as AIIB IT strategy will be reviewed later soon this year, an independent and comprehensive view of the latest IT market and technology trends become rather imperative.

2. Target Solution Outline

Subscription and utilization of credible independent researches on IT market and vendor is a pretty common practice adopted by other MDBs and credible global financial institutions. It is rather pivotal for AIIB considering the current fast-growing stage and the lean IT team.

- The research reports will be mainly utilized by IT but also Corporate Procurement members who support IT specific procurements. Mitigating risks in non-trivial IT spendings
- Helping the reviewing and upgrading of IT strategy
- Empowering lean IT team to gain much higher productivity

The tentative period of subscription is one year, and the subscription may not be limited to one single vendor depending on AIIB IT business needs and the vendor's offerings.

3. Technical Requirements

3.1. Definitions

Definitions of requirement types are listed below, as well as payment options and their codes

Requirement Type	Meaning and Samples	Payment Options	CODE of Pay Option
Features of Product/Service (FE)	Perpetual hardware devices; Device Leasing; Perpetual or Annual software license fee (Base/Custom-built module, and/or Reusable code) Service Subscription; Data Subscription; Standard Trainings; Maintenance (periodic upgrades with bug fixing, regular inspection)	Perpetual pay on acceptance of deliveries	FE-PE
		Prepay yearly or quarterly	FE-PP
		Pre-stored fee	FE-SF
		Pay as incurred monthly or quarterly	FE-IN
Implementation (IM)	Full cycle implementation including requirement and feature mappings; coding; codeless configuration; integration with surrounding systems; testing (mainly SIT and UAT); user training, go live, post evaluation, end-to-end project management etc.	Pay per passing checkpoints, e.g. . Project Kickoff, up to 20% . Day1 scope go-live, up to 50% . Full scope go-live, up to 80% . Closure review, rest of payment	IM-CP
Operation (OP)	Outsourced on-site and/or remote user/system operation support by named supporters	Pay per rated resource, deliverable and SLA compliance quarterly	OP-SL
Enhancement (EN)	Sporadic implementation responding to non-trivial Change Requests for enhancing live production systems	Pay per approved time sheet for Change Request(s) quarterly	EN-TS
Consulting (CO)	Services such as advisory, assessment etc. (no runnable deliverables)	Pay per acceptance of deliverables	CO-TS
		Pay per approved time sheet for assignments	CO-AC
Other (OT)	Offerings that can't be categorized by above	Depends on the real circumstance	OT-XX

3.2. Features of Product/Service

Requirement items are classified in two tiers: Basic (1) and Advanced (2). Tier 1 items ought to be fully or partially met and elaborated in proposal.

ID	Tier	Requirement Headline	Guide for Response
FE.1.1	1	Objectivity and independence of research	Declare vendor-sponsored research since 2018
FE.1.2	1	Transparency of research approach, metrics definition, data sources and details	Give 2 samples

FE.1.3	1	The enough scale of research data sampling	How many IT decision makers in 2018 collected data from and responded queries to?
FE.1.4	1	Focused research on financial industry and banking arena	List relevant researches (research report title and abstract, the same below) since 2018
FE.1.5	2	Strong credibility and influence.	Quotations by global credible media since 2018
FE.2.1	1	Intuitive illustration of competition landscape and trends (vendor's strength/weakness)	Give an example to show a research on same topic in 2018 and 2019 respectively
FE.2.2	1	Benchmark fair market prices and service level of mainstream IT offerings	Give 2 samples
FE.2.3	1	Research on China presence and local capability of global IT vendors	Number of IT suppliers that were covered by researches in 2018
FE.2.4	2	Contract terms and conditions and pricing review for mission critical projects	Give 2 samples
FE.3.1	1	Research on modern IT organization, IT operational model and performance	List relevant researches since 2018; IT organization maturity assessment approach/tools if available
FE.3.2	1	Research on digital transformation topics	List relevant researches since 2018
FE.3.3	1	Research on technology maturity and its adoption situation and trend	List relevant researches since 2018
FE.3.4	1	Research on symbolic application of disruptive technologies	List relevant researches since 2018 for AI, IoT, Block Chain, 5G etc.
FE.3.5	2	Research on Build or Buy options in cloud computing era	List relevant researches since 2018
FE.3.6	2	Research on IT program and portfolio management practices and trends	List relevant researches since 2018
FE.4.1	1	Research on IT and Business engagement practices and trends	List relevant researches since 2018
FE.4.2	1	(IT service) client experience assessment approach and tools	List relevant researches since 2018
FE.5.1	1	Data and Analytics practices and trends	List relevant researches since 2018
FE.5.2	1	Cloud computing practices and trends	List relevant researches since 2018
FE.5.3	2	IT Architecture/Integration practices and trends	List relevant researches since 2018
FE.5.4	2	Research on consolidated and comprehensive cybersecurity management	List relevant researches since 2018; List the cybersecurity vendors covered by those researches
FE.5.5	2	Research on consolidated and comprehensive IT risk management	List relevant researches since 2018 List the IT risk consulting vendors covered by those researches
FE.6.1	1	Sounding board for AIIB IT leadership	How seasoned practitioners will play the role
FE.6.2	1	Strong global analyst team and local presence	Number of analysts globally; Analysts in China and their respective expertise; Global analyst visits to China since 2018 and their respective expertise

FE.6.3	1	Inquiries with analysts and authors of research	Elaborate to what extent this can be arranged and how it will be conducted
FE.6.4	1	Effective approach to facilitate experience exchange among peer organizations	Elaborate available options e.g. online forum and conference etc. since 2018
FE.6.5	2	Tailormade seminar for concerned topics	Form and expertise level of organizers etc.
FE.6.6	2	Unique value and approach that cannot be substituted by other research players	Elaborate the top three if applicable

Annex E. Bid Forms

E1: Forms for Technical Bid

E2: Forms for Financial Bid

E1-a

Technical Bid Submission Letter

Date: *[mm/dd/yyyy]*

IFB No.: *[Insert Number consistent with IFB]*

Dear Mr/Ms. *[Insert the person's name from AIIB in the IFB cover letter]*

Corporate Procurement Unit

Asian Infrastructure Investment Bank (AIIB)

We, the undersigned, have examined and have no reservations to the Bidding document. We offer to supply in conformity with the Bidding document the following Services:

[Name of the Services covered by the bid] ;

Our firm, including any subcontractors, has not been declared ineligible by the AIIB, the WB, the ADB, and other MDBs.

We hereby declare that all the information and statements made in this Bid are true and factual. We understand that any misrepresentation may lead to our disqualification and action by AIIB in accordance with AIIB's Policy on Prohibited Practices.

We understand that you are not bound to accept any bid that you may receive.

We remain,

Yours sincerely,

Authorized Signature:

Name and Title of Signatory:

Name of Firm:

Address:

E1-b Bidder's Basic Information

Bidder's legal name	
Bidder's country of constitution/registration	
Bidder's year of constitution/registration	
Bidder's legal address in country of constitution/registration	
Bidder's website	
Bidder's Annual Turnover in last three years	1. <i>[year, currency, amount]</i> ; 2. <i>[year, currency, amount]</i> ; 3. <i>[year, currency, amount]</i> (Please give both global and China regional figures)
Bidder's authorized representative (name, address, telephone numbers, fax numbers, e-mail address)	

The Bidders are required to attach the following documents:

- ☐ 1. Articles of incorporation or constitution/registration document of the legal entity named above.
- ☐ 2. Confirmation of Authorization to represent the Bidder.

Please make a declaration confirming the absence of any ineligible cases by answering the question below. Does your firm have any ineligible case which against AIIB's Policy on Corporate Procurement and Directive on corporate Procurement in Annex C?

☐ **Yes**

☐ **No**

E1-c Bidder's Experience

List out the most relevant 3 reference cases in below format.

Case Name	Reference Case 1	Reference Case 2	Reference Case 3
Client Name			
Is it Financial Industry Client			
Is it Banking Industry Client			
Is it Multilateral Dev. Bank Client			
Other Industry (if none of above)			
Country			
Contract Duration			
Contract Amount			
Application Lifecycle Stage*			
User/Business Function Context			
System Integration Context			
Client Satisfaction Level *			
Bidder's role played in the case (Sole Supplier/JV Partner)			
Project members from the Bidder*			
Other participant vendors			
Case Highlights (within 140 words)			

(*) Remarks

- "Lifecycle Stage" can be Preparation, Under Construction, In Production.
- "Client Satisfaction Level", pls state the possibility to get testimonial or arrange visiting/meeting with the client of the reference case.
- Underscore the name of those who will be assigned to the project of this bid
- Further details of the top three reference cases and other relevant reference cases can be placed into in Appendix D

E1 - d Service Plan

(*the response format is not restricted but below contents must be included)

1) Solution Proposal																	
<i>[Response Instruction for the Technical Requirements]</i> Please clone all requirement items from Annex D-3.2. in below table structure with additional two columns on the right. - Brief Response is required in one of the three options: Full, Partial, or None; - Elaboration is required unless the brief response is None. Elaboration should address the content stated in the column of "Guide to Response". DO NOT simply copy and paste standard product/services description in "Elaboration", but instead such information can be placed into relevant Appendix. Please be aware of below rules - All responses in this part are deemed as being covered by the quotation proposed - The content of oral presentation materials should not go beyond the content in this part, or otherwise it is deemed as being offered as complimentary. <table border="1" data-bbox="237 877 1385 982"><thead><tr><th>ID</th><th>Tier</th><th>Requirement Headline</th><th>Guide for Response</th><th>Brief Response (Full/Partial/None)</th><th>Elaboration</th></tr></thead><tbody><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></tbody></table>						ID	Tier	Requirement Headline	Guide for Response	Brief Response (Full/Partial/None)	Elaboration						
ID	Tier	Requirement Headline	Guide for Response	Brief Response (Full/Partial/None)	Elaboration												
2) Proposed Deliverables																	
3) Quality Assurance Measures																	
<i>[Specify concrete measures to ensure the quality of the Services]</i>																	
4) Resource Plan																	
<i>[Team composition for the Services: list the names and positions of key personnel]</i>																	

5) Business Continuity
<i>[To provide a business continuity plan and business continuity testing procedures, which include but are not limited to the areas of disaster recovery planning and pandemic planning]</i>

E1-e Curriculum Vitae (CV) of Key Personnel

1. Position:	<i>[Same Position Title: _____, as in page 1]</i>		
2. Name:	<i>[Family name, Given Name]</i>		
3. a) Year of Birth	<i>[yyyy]</i>	b) Place of Birth	<i>[Name of Country]</i>
4. Citizenship	<i>[Name of Country]</i>		
5. Name and Address of Current Employer:			
6. Education:	<i>[List degrees, major/area of specialization, the date(s) mm/yyyy of diploma(s) and institute(s)]</i>		
7. Membership in Professional Associations			
8. Language Skills	<i>[List the language(s) and related skill level: Native, Fluent, Intermediate, Basic]</i> 1. English (Mandatory): 2. ... 3. ...		
9. Employment Record			
<i>[Starting with present position, list in reverse order every employment in the past 10 years]</i>			
From <i>[mm/yyyy]</i> To <i>[mm/yyyy]</i> Employer: Positions held: Location(s): Main Responsibilities:			
10. Past Work Experiences Relevant to the Purchaser's Requirement			
<i>[List major assignments in the past 10 years that can best illustrate the person's capability to handle the tasks listed in the left column.]</i>			

<i>[Insert the major tasks in the Purchaser's Requirement here]</i> <i>[Task 1: _____]</i> <i>Task 2: _____</i> <i>Task 3: _____]</i>	<i>[Work experiences relevant to Task 1: Time Period: From mm/yyyy to mm/yyyy Name of Client: Position held: Main Responsibilities/Outputs:]</i> <i>[Work experiences relevant to Task 2: Time Period: From mm/yyyy to mm/yyyy Name of Client: Position held: Main Responsibilities/Outputs:]</i> <i>[Work experiences relevant to Task 3: Time Period: From mm/yyyy to mm/yyyy Name of Client: Position held: Main Responsibilities/Outputs:</i>
11. Certification:	

I, the undersigned, certify to the best of my knowledge and belief that

- this CV accurately describes my qualifications and my experience ☐ Yes ☐ No
- I am currently under sanction by AIIB ☐ Yes ☐ No
- I am former AIIB staff ☐ Yes ☐ No

I understand that any willful misstatement described herein may lead to my disqualification or dismissal, if engaged, or sanction by AIIB in accordance with its Policy on Prohibited Practices.

[Signature] Date: [dd/mm/yyyy]

E2-a

Financial Bid Submission Letter

Date: *[mm/dd/yyyy]*

IFB No.: *[Insert Number consistent with IFB]*

Dear Mr/Ms. *[Insert the person's name from AIB in the IFB cover letter]*
Corporate Procurement Unit
Asian Infrastructure Investment Bank (AIB)

We, the undersigned, offer to provide the financial bid for [name of the assignment], in accordance with your Request for Bid dated *[date]*. The total price of our Bid inclusive of all taxes and duties is: *[Amount in words and figures]*. And please also find our Price Schedule in the Attachment.

Our Financial Bid shall be binding upon us subject to the modifications resulting from Contract negotiation.

We remain,

Yours sincerely,

Authorized Signature:
Name and Title of Signatory:
Name of Firm:
Add:

E2-b Price Schedule for General Services

- Price breakdown is requested.
- Additional 3 years projection cost is requested for our consideration of longer contract period.

Quotation Items			Quotation of Proposal				Additional 3 years project cost		
SN.	Quotation Item	Code of Pay Option (refer to Annex D-3.1)	Unit	Unit Price	Quantity	Subtotal Price (USD or CNY)	+year1	+year2	+year3
1	[name of Goods/Services]								
2	---								
3	---								
4	[Service Fee related]		Lot						
5	---								
6									

Total Contract Value (all taxes included): USD or CNY 000,000.00

E2-c) Summary Price Schedule

Price Schedule	Payment Terms and Conditions	Total Price in [insert currency]
a)	Price Schedule for Goods/Services	[Bidder inserts the amount]
b)	Price Schedule for Goods/Services	[Bidder inserts the amount]
Grand Total (all taxes inclusive) in [insert currency]		

Annex F. General Terms and Conditions (GTC)

(https://www.aiib.org/en/opportunities/business/.content/index/_download/aiib-general-terms-and-conditions.PDF)