

Revision in Clause 7.5.5.

7.5.5. Eligibility Criteria and Technical bids would be evaluated based on the following eligibility criteria / Evaluation Parameters

| Criteria | Existing As per Addendum – I | | | Revised Parameter | | |
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| | Evaluation Parameter | Max Marks | Scoring Methodology | Evaluation Parameter | Max Marks | Scoring Methodology |
| Annual Revenue of the bidder | <p>Annual Revenue of the bidder- The average of annual revenue (best of three in the five financial years starting from FY2018¹) of the bidder.</p> <p>Minimum – Rs. 125 crore Revenues refer to revenues that the bidder has earned as advisory fees in India on topics such as strategy / operations / sales / performance/ transformation / turnaround / organization design/digital transformation/ framework design & implementation/ Risk Management, Sustainability/ ESG, New Product Development, etc. 1- Companies following Calendar Year as a financial year may kindly can submit their statements from CY2017 onwards.</p> | 15 | <p>Average Turnover revenue (best of three in the five years financial years starting from FY2018):</p> <ul style="list-style-type: none"> ✓ Equal to or more than ₹125 crore but less than ₹200 Crore – 4 marks ✓ Equal to or more than ₹200 crore but less than ₹350 Crore – 8 marks ✓ Equal to or more than ₹350 crore but less than ₹500 Crore – 12 marks ✓ Equal to or more than ₹500 crore – 15 marks <p><i>Copy of relevant audited financial statements.</i></p> <p>Bidder may highlight relevant paras in the Audited Financial Statements wherein advisory fees are mentioned separately. In case of non-availability of bifurcation of fees (advisory fee and others) in the Audited Financial Statements Certificate from practising Chartered Accountant (with UDIN) stating revenues from advisory fees in relevant financial years may be furnished.</p> | <p>Annual Revenue of the bidder- The average of annual revenue (best of three in the five financial years starting from FY2018¹) of the bidder.</p> <p>Minimum – Rs. 125 crore Revenues refer to revenues that the bidder has earned as advisory fees in India on topics such as strategy / operations / sales / performance/ transformation / turnaround / organization design/digital transformation/ framework design & implementation/ Risk Management, Sustainability/ ESG, New Product Development, etc. 1- Companies following Calendar Year as a financial year may kindly can submit their statements from CY2017 onwards.</p> | 15 | <p>Average Turnover revenue (best of three in the five years financial years starting from FY2018):</p> <ul style="list-style-type: none"> ✓ Equal to or more than ₹125 crore but less than ₹200 Crore – 4 marks ✓ Equal to or more than ₹200 crore but less than ₹350 Crore – 8 marks ✓ Equal to or more than ₹350 crore but less than ₹500 Crore – 12 marks ✓ Equal to or more than ₹500 crore – 15 marks <p><i>Copy of relevant audited financial statements.</i></p> <p>Bidder may highlight relevant paras in the Audited Financial Statements wherein advisory fees are mentioned separately. In case of non-availability of bifurcation of fees (advisory fee and others) in the Audited Financial Statements Certificate from practising Chartered Accountant (with UDIN) stating revenues from advisory fees in relevant financial years may be furnished.</p> |

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| Bidders Experience | Bidders Experience- Experience in implementing projects each of minimum size of ₹1 crore, in the last 3 years, substantially focussing on environment / green finance and implementation of green finance products / ESG framework for a) Banks/ Institutions having loan portfolio size of more than ₹1,00,000 crore or b) NBFCs having portfolio size of more than ₹10,000 crore in the areas of green finance / ESG. Minimum – One completed eligible assignment. Turnover is restricted to income generated in India only. 3 years will be counted from date of completion of Assignment. | 15 | 3 Marks for each completed eligible assignment with greater marks for higher value projects submitted. Only completed assignments will be considered for evaluation. • Completion Certificate from client “OR” • Self-Declaration to be furnished by the bidder on its letter head. Bidder should submit brief description of the assignment and duration of the assignment along-with copy of the work order / contract to verify the credentials. The Bank reserves the right to ask for contact details (Name, email, contact number) of the clients at the time of technical evaluation. | Bidders Experience- Experience in implementing Global projects each of minimum size of ₹1 crore / Indian projects each of minimum size of ₹50 lakh, in the last 4 years, focussing on environment / green finance and implementation of green finance products / ESG framework for a) Banks/ Institutions having loan portfolio size of more than ₹1,00,000 crore or b) NBFCs having portfolio size of more than ₹10,000 crore or c) Companies having turnover size more than ₹30,000 crore Minimum – One completed eligible assignment. | 15 | Scoring is based on- A. 2 marks for each completed assignment- (max 10 marks) B. Project Size (max 5 projects will be evaluated) • Project size > ₹ 50 lakh and up to ₹1 crore - 0.50 mark each • Project size more than 1 crore -1 mark each Total marks will be summation of A+B (max 15 marks). Only completed assignments will be considered for evaluation. • Completion Certificate from client “OR” • Self-Declaration to be furnished by the bidder on its letter head. Bidder should submit brief description of the assignment and duration of the assignment along-with copy of the work order / contract to verify the credentials. The Bank reserves the right to ask for contact details (Name, email, contact number) of the clients at the time of technical evaluation. |
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| <p>Suitability of key resource – Project Head (Head-Green Initiatives)</p> | <p>Project Head (Head-Green Initiatives) Education / Experience Qualification ✓ Experience of minimum 15 years in the capacity of Project Head in the field of developing and implementing detailed projects for large financial institutions in a variety of areas, including green finance products / ESG frameworks for BFSI / large corporates.</p> <p>✓Educational qualification – -Post graduate degree in finance or management or economics or environment or related field.</p> | <p>15</p> | <p>Project Head (Head-Green Initiatives) Scoring Methodology- CV should cover: ✓ Educational Background / Qualification (Max 2 marks):</p> <ul style="list-style-type: none"> • Till 'Post Graduation' - '0' marks • Beyond 'Post Graduation' - '2' marks. <p>✓ Experience of relevant engagements in detail (Max 10 marks)</p> <ul style="list-style-type: none"> • 2 marks for each completed relevant assignment. <p>✓Overall experience in the field of developing / implementing green finance products / ESG frameworks for BFSI – (Max 3 marks)</p> <ul style="list-style-type: none"> • for experience of 15 yr and upto 17 yr - 1 mark; • >17 yr and upto 20 yr - 2 marks; • >20 years - 3 marks. <p>Scoring shall be done through Evaluation and qualitative Assessment of CV and credentials submitted.</p> | <p>Project Head (Head-Green Initiatives) Education / Experience Qualification ✓ Experience of minimum 10 years in the capacity of Project Head in the field of developing and implementing detailed projects for large financial institutions in a variety of areas, including green finance products / ESG frameworks for BFSI / large corporates.</p> <p>✓Educational qualification – -Post graduate degree in finance or management or economics or environment or related field.</p> | <p>15</p> | <p>Project Head (Head-Green Initiatives) Scoring Methodology- CV should cover: ✓ Educational Qualification (Max 2 marks):</p> <ul style="list-style-type: none"> • Till 'Post Graduation' - '0' marks • Course(s) undertaken beyond 'Post Graduation' from reputed institutions²- '2' marks. <p>✓ Experience of relevant engagements in detail as indicated in the evaluation parameter (Max 10 marks)</p> <ul style="list-style-type: none"> • 2 marks for each completed relevant assignment. <p>✓Overall experience– (Max 3 marks)</p> <ul style="list-style-type: none"> • for experience of 10 years and up to 12 years – 1 mark • >12 years and up to 15 years – 2 marks • >15 years – 3 marks. <p>Scoring shall be done through Evaluation and qualitative Assessment of CV and credentials submitted.</p> <p>2- Online courses shall not be considered for scoring.</p> |
| <p>Domain Expert– Senior (Green Initiatives)</p> | <p>Domain Expert– (Senior) (Green Initiatives) Educational Qualification- ✓ Minimum experience of 10 years in field of sustainability, climate change, energy transition, decarbonization, renewables (solar, wind,</p> | <p>15</p> | <p>Domain Expert– (Senior) (Green Initiatives) Scoring Methodology- CV for each domain expert should cover ✓Educational qualification (Max 02 marks)</p> | <p>Domain Expert– (Senior) (Green Initiatives) Educational Qualification- ✓ Minimum experience of 7 years in field of sustainability, climate change, energy transition, decarbonization,</p> | <p>15</p> | <p>Domain Expert– (Senior) (Green Initiatives) Scoring Methodology- CV should cover ✓Educational qualification (Max 02 marks):</p> <ul style="list-style-type: none"> • Till 'Graduation' - '0' marks |

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| | <p>hydrogen, hydro, geothermal), sustainable financing, carbon offsets, carbon modelling, ESG. Preference would be given for experience in the above area at international agencies such as World Bank, ADB, OECD, IFC etc. and other relevant agencies such as Green Funds, Sustainability Think-Tanks, large corporates etc.</p> <p>✓ Minimum Global experience 2 years</p> <p>✓ Educational qualification- Graduate / Post graduate degree in finance or management or economics or environment or related field.</p> | <p>✓ Overall experience including global experience (Max 4 marks)</p> <ul style="list-style-type: none"> • for experience of 10 yr and upto 12 yr - 02 marks • >12 yr and upto 15 yr - 03 marks • >15 years - 04 marks <p>✓ Relevant Work Experience (Max 9 marks)</p> <p>(a) 2 marks for each completed relevant assignment (<i>max. 6 marks</i>)</p> <p>(b) Work experience at international agencies (World Bank, ADB, OECD, IFC etc.) and other relevant agencies such as Green Funds, Sustainability Think-Tanks, large corporates etc. (<i>max 3 marks</i>)</p> <ul style="list-style-type: none"> ▪ 1 mark for each assignment or engagement at international agencies such as World Bank, ADB, OECD, IFC etc. ▪ 0.5 marks for each assignment or engagement at other relevant agencies such as Green Funds, Sustainability Think-Tanks, large corporates etc. <p>Scoring shall be done through Evaluation and qualitative Assessment of CV and credentials submitted.</p> | <p>renewables (solar, wind, hydrogen, hydro, geothermal), sustainable financing, carbon offsets, carbon modelling, ESG. Preference would be given for experience in the above area at international agencies such as World Bank, ADB, OECD, IFC etc. and other relevant agencies such as Green Funds, Sustainability Think-Tanks, large corporates etc.</p> <p>✓ Minimum Global experience 2 years</p> <p>✓ Educational qualification- Graduate / Post graduate degree in finance or management or economics or environment or related field.</p> | <ul style="list-style-type: none"> • Post-Graduation and beyond degree(s)- '2' marks. <p>✓ Overall experience including global experience (Max 4 marks)</p> <ul style="list-style-type: none"> • for experience of 7 years and up to 9 years - 02 marks • >9 years and up to 12 years - 03 marks • >12 years - 04 marks <p>✓ Experience of relevant engagements in detail as indicated in the evaluation parameter (Max 9 marks)</p> <p>(c) 2 marks for each completed relevant assignment as indicated in the eligibility criteria (max. 6 marks)</p> <p>(d) Work experience at international agencies (World Bank, ADB, OECD, IFC etc.) and other relevant agencies such as Green Funds, Sustainability Think-Tanks, large corporates etc. (<i>max 3 marks</i>)</p> <ul style="list-style-type: none"> ▪ 1 mark for each assignment or engagement at international agencies such as World Bank, ADB, OECD, IFC etc. ▪ 0.5 marks for each assignment or engagement at other relevant agencies such as Green Funds, Sustainability Think- |
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| | | | | | | <p>Tanks, large corporates etc.</p> <p>Scoring shall be done through Evaluation and qualitative Assessment of CV and credentials submitted.</p> |
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| <p>Domain Expert– Junior (Green Initiatives)</p> | <p>Domain Expert– (Junior) (Green Initiatives) Educational Qualification- ✓ Minimum experience of 5 years in field of sustainability, climate change, energy transition, decarbonization, renewables (solar, wind, hydrogen, hydro, geothermal), sustainable financing, carbon offsets, carbon modelling, ESG. Preference would be given for experience in the above area at international agencies such as World Bank, ADB, OECD, IFC etc. and other relevant agencies such as Green Funds, Sustainability Think-Tanks, large corporates etc. ✓ Educational qualification- Graduate / Post graduate degree in finance or management or economics or environment or related field.</p> | <p>10</p> | <p>Domain Expert– (Junior) (Green Initiatives) Scoring Methodology- CV for each domain expert should cover ✓ Educational qualification (01 marks) ✓ Overall experience (Max 3 marks)</p> <ul style="list-style-type: none"> • for experience of 5 yr and upto 7 yr - 01 marks • >7 yr and upto 10 yr - 02 marks • >10 yr – 03 marks <p>✓ Relevant Work Experience (Max 6 marks)</p> <p>(a) 1 mark for each completed relevant assignment (max. 4 marks)</p> <p>(b) Work experience at international agencies (World Bank, ADB, OECD, IFC etc.) and other relevant agencies such as Green Funds, Sustainability Think-Tanks, large corporates etc. (max 2 marks)</p> <ul style="list-style-type: none"> ▪ 1 mark for each assignment or engagement at international agencies such as World Bank, ADB, OECD, IFC etc. ▪ 0.5 marks for each assignment or engagement at other relevant agencies such as Green Funds, Sustainability Think-Tanks, large corporates etc. | <p>Domain Expert– (Junior) (Green Initiatives) Educational Qualification- ✓ Minimum experience of 5 years in field of sustainability, climate change, energy transition, decarbonization, renewables (solar, wind, hydrogen, hydro, geothermal), sustainable financing, carbon offsets, carbon modelling, ESG. Preference would be given for experience in the above area at international agencies such as World Bank, ADB, OECD, IFC etc. and other relevant agencies such as Green Funds, Sustainability Think-Tanks, large corporates etc. ✓ Educational qualification- Graduate / Post graduate degree in finance or management or economics or environment or related field.</p> | <p>10</p> | <p>Domain Expert– (Junior) (Green Initiatives) Scoring Methodology- CV should cover ✓ Educational qualification (Max 01 marks):</p> <ul style="list-style-type: none"> • Till 'Graduation' - '0' marks • Post-Graduation and beyond degree(s)- '1' marks. <p>✓ Overall experience (Max 3 marks)</p> <ul style="list-style-type: none"> • for experience of 5 years and up to 7 years - 01 marks • >7 years and up to 10 years - 02 marks • >10 years – 03 marks <p>✓ Experience of relevant engagements in detail as indicated in the evaluation parameter (Max 6 marks)</p> <p>(c) 1 mark for each completed relevant assignment (max. 4 marks)</p> <p>(d) Work experience at international agencies (World Bank, ADB, OECD, IFC etc.) and other relevant agencies such as Green Funds, Sustainability Think-Tanks, large corporates etc. (max 2 marks)</p> <ul style="list-style-type: none"> ▪ 1 mark for each assignment or engagement at international agencies such as |
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| | | | Scoring shall be done through Evaluation and qualitative Assessment of CV and credentials submitted. | | | <p>World Bank, ADB, OECD, IFC etc.</p> <ul style="list-style-type: none"> 0.5 marks for each assignment or engagement at other relevant agencies such as Green Funds, Sustainability Think-Tanks, large corporates etc. <p>Scoring shall be done through Evaluation and qualitative Assessment of CV and credentials submitted.</p> |
| PPT | <ul style="list-style-type: none"> ✓ Understanding of the scope of the assignment. ✓ Understanding of Domestic/ Global ecosystem for Climate change/green finance ✓ Understanding of MSME/ Start-up sector and their requirements both financial and non-financial for addressing the issues related to climate change / green finance ✓ Understanding of Indian and International Institutions, donors, impact fund, etc. to facilitate supporting / financing of projects under Climate Change/Green Finance ✓ In depth understanding of sustainability, climate, energy transition, decarbonization, renewable energy and environmental, social and governance | 30 | Assessment by Evaluation Committee based on the presentation and interaction during the presentation to the Evaluation Committee | | | |

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| | (ESG) aspects in the Indian context. ✓ Brief of the assignments/projects completed during last 3 years ✓ Understanding of deliverables of the engagement. | | | | | |
| | Total Marks | 100 | | Total Marks | 100 | |

A "Combined Score" will be arrived at, taking into account both marks scored through technical bid evaluation and the commercial quotes with a weightage of **80% for technical and 20% for commercials.**