

Expression of Interest (EOI)

for

Appointment of Consultant for

**“Make in India” campaign in the
Oil & Gas Industry**



**Petroleum Planning & Analysis Cell
MINISTRY OF PETROLEUM & NATURAL GAS**

Expression of Interest (EOI)

for ASSISTING THE STEERING COMMITTEE OF THE MINISTRY OF PETROLEUM & NATURAL GAS IN PREPARATION OF AN ANALYTICAL REPORT FOR LAUNCHING THE “MAKE IN INDIA” CAMPAIGN IN THE OIL & GAS SECTOR

1. Background

Government of India has launched the “Make in India” campaign to attract manufacturers to invest and manufacture in India. The Make in India program includes major new initiatives designed to facilitate investment, foster innovation, enhance skill development, protect intellectual property and build best-in-class manufacturing infrastructure.

In order to roll out the “Make in India” campaign in the Oil & Gas Industry, i.e. import substitution by domestic manufacturing for equipment and chemicals used in Petroleum & Natural Gas sector, domestic development of software requirement and human resource development in the Oil & Gas sector, Ministry of Petroleum & Natural Gas has constituted a Steering Committee to formulate a time bound action plan to successfully implement it in consultation with different stakeholders. The Steering Committee would also monitor progress of these initiatives to ensure that the desired outcomes are achieved as per the timelines.

The major objectives of the Committee are to devise a strategy and develop a roadmap for successful implementation of “Make in India” campaign in the oil and gas industry are as follows:

- I. To assess the following:
 - (a) Reasons for relatively lower levels of investment in the manufacturing sector in the oil and gas industry in India.
 - (b) Role of different Government bodies in setting up business in India.
 - (c) Compulsions for importing most of the materials required in the oil and gas industry
 - (d) Market potential for the fabricated materials both locally within India and globally
 - (e) Current status of infrastructure, related policies, skills and raw material.
 - (f) Steps taken by other countries to promote local manufacturing

- II. To design the following:
 - a) Steps required for setting up of a manufacturing hub dedicated to the oil and gas industry.

- i) Participation in setting up manufacturing in India –
 - a) by Indian industry;
 - b) by Inward investors;
 - ii) Participation in setting up shops in India to render services in and outside India
 - b) Identifying incentives required, if any, to attract manufacturing companies to India
 - c) Streamlining regulatory requirements for setting up manufacturing business in India.
 - d) Clear roles for different Government bodies in this initiative.
 - e) Replicating the local manufacturing success stories of different countries which are implementable in India.
- III To develop an action plan to successfully roll out the “Make in India” campaign in Oil and gas industry with clear timelines.

The Petroleum Planning & Analysis Cell (PPAC), an attached office of the Ministry of Petroleum & Natural Gas proposes to engage the services of a consulting agency for **ASSISTING THE STEERING COMMITTEE OF THE MINISTRY OF PETROLEUM & NATURAL GAS IN PREPARATION OF AN ANALYTICAL REPORT FOR LAUNCHING OF THE “MAKE IN INDIA” CAMPAIGN IN THE OIL & GAS SECTOR.**

2. Scope of the Job

It is proposed to carry out a detailed evaluation of the investment climate, manufacturing infrastructure, regulatory framework, global best practices, etc. for promoting domestic manufacturing and develop an action plan for successful roll out of the “Make in India” campaign in the oil and gas sector.

3. Terms of Reference

The agency is broadly expected to:

1. Help the steering committee in the following:
 - i) Assess the reasons for lower participation of domestic industry in the oil & gas sector in the country
 - ii) Assess the status of the domestic sector in the form of infrastructure, skills, raw materials and Government policies and incentives vis-à-vis International in the oil & gas sector
 - iii) Study international best practices in promoting the domestic sector and attracting investments in the manufacturing sector in the oil & gas sector
 - iv) Suggest enabling clauses to align the existing purchase practices of the companies engaged in the oil and gas sector to promote preference to the domestic manufacturers/ service providers
 - v) Provide inputs on such other issues required so that the committee can design appropriate policy for the Make in India campaign

2. Conduct consultation with stakeholders in oil & gas sector.
3. Design appropriate policy formulation and actionable points with timelines to roll out the Make in India campaign

Methodology and Time Frame

The methodology and work activities of the consultancy consists of three principal activities:

1. Initial consultation, document/policy review and preparation of present status of the domestic sector vis-à-vis international best practices
2. Conducting stakeholders consultation
3. Analysis and preparation of draft report incorporating appropriate policy designs and actionable points with timelines to roll out Make in India in the Oil & Gas sector.

The proposed time frame for submission of the draft report is two months (Eight weeks). The work schedule will be as indicated in the table below:

Activity/ Week	W1	W2	W3	W4	W5	W6	W7	W8
Initial Consultation								
Document/ Policy review – Domestic & International								
Preparation of status of domestic sector vis-à-vis international								
Conducting stakeholders consultation								
Analysis and submission of draft report								

4. Pre-qualifying criteria:

Parties who are interested to participate in the tender should meet the following eligibility criteria:

- a) The Consultant can be a single bidding company, or a consortium of companies. However, the consultant/ members of the bidding consortium should each be a Company registered under the Companies Act, 1956.
- b) The Bidder should submit the EOI in **Forms-1 to 6**. The Bidder must provide a brief profile of the organization/firm. The Bidder shall also indicate his/their Permanent Account Number (PAN) and Sales Tax/ VAT/ Service Tax Registration number. In the absence of the same, the tender shall be liable to be rejected.

- c) The Bidder should have been in existence for at least **five (5) years** prior to the date of publication of this EOI. It should possess the following:
- Energy advisory experience, as a firm, of at least **five (5) years**;
 - Should have prior experience of policy advisory, institutional strengthening and capacity building related to industrial development and investment promotion.
 - Sector wide-expertise and experience in oil & gas sector and promotion of investments and domestic manufacturing in India and abroad, including:
 - Experience of at least **three (3)** consultancy projects for Central/ State Governments/ Union Territory, involving program management support in attracting investments and domestic manufacturing.
 - International experience of at least **three (3)** consultancy projects in engaging with Governments to promote domestic manufacturing in that country.
 - Experience of at least **three (3)** consultancy projects in engaging with Central/ State Governments/ Companies in the country in the Oil & Gas sector on issues related to investment climate, investment decisions, etc.
 - On field experience in conducting at least **one (1)** stakeholders consultation
- d) The Bidder would also estimate the number of professional staff months for the assignment/ job. While making the proposal, the Bidder must ensure that it proposes the minimum number and type of experts as sought by the Employer, failing which the proposal shall be considered as non-responsive. The list of personnel, along with detailed biodata, expected to be engaged in the work and the team leader with all participants should be given in the EOI submitted. Supporting documents regarding experience of successful execution of such jobs are to be enclosed with the EOI documents. Apart from the firm's experience as detailed in (c) above, the bidder has to provide details of at least **one (1)** key personnel (an expert) **for each** of the above areas of expertise, who has the relevant experience of providing similar investment facilitation support.
- e) The party should have a minimum annual turnover of **Rs. Twenty (20) crore** in at least two (2) out of previous three (3) preceding financial years. The documentary evidence in the form of certificate from the Statutory Auditor of the Consultant (Lead Consultant, in case of a Consortium), certifying the revenues from the consultancy services during each of the last three (3) financial years shall need to be provided.
- f) It should be registered under all laws applicable in India viz Labour /PF registration/ service tax registration, etc.
- g) The party should have a good reputation and good track record for delivery / completion of studies/surveys on time.
- h) The party shall undertake that the data collected/ collated/ received and study result shall not be disclosed to any other entity without the **prior written** consent of PPAC.
- i) The party should not have been blacklisted at any time by any Central/ State Government/ Public Sector Undertaking in India. An undertaking to this effect should be submitted by the Bidder in the enclosed **Form-7**.

- j) The response to this EOI must be complete and comprehensive with explicit documentary evidence in support of all the eligibility criteria mentioned herein (copies of Purchase Orders / Completion Reports, turnover details, key personnel details, etc. must be enclosed.)

5. Short listing of Parties: Based on the EOIs received, the short listed parties would be given the Request for Proposal (RFP) for submitting the tender. PPAC would shortlist the parties qualifying for submitting price bids in the following manner:

- a) A committee formed by the Competent Authority of PPAC would scrutinize all EOIs received and verify details as per the documents submitted for each of the qualifying criteria including turnover, experience of key personnel, national/ global presence, past experience in conducting similar studies, etc., amongst others.
- b) Apart from criteria as given above, the information furnished by the parties on methodology proposed to be adopted for carrying out this assignment, along with details of stakeholder interaction, will also form part of the qualifying criteria.
- c) The bidders who meet ALL the essential pre-qualifying criteria would be shortlisted.
- d) Only the short listed bidders would be given the Request for Proposal (RFP) for submitting the tender/ commercial bid.
- e) PPAC reserves the right to reject any party from being short listed without assigning any reason and its decision would be final. No correspondence in would be entertained in this regard.

6. Please note:

- a) This is **NOT** a Request for Proposal (RFP) and commercial/ price bid is NOT to be submitted along with this EOI.
- b) EOIs not received in the format or those incomplete in any respect (including non-submission of supporting documents) shall be summarily rejected.
- c) PPAC shall not reimburse any costs incurred by the Bidder on account of preparation/ submission of this EOI and/or any other costs incurred.
- d) PPAC's decision to shortlist the parties for submitting the RFP shall be final.
- e) PPAC may ask the parties to make a presentation at their cost to understand the methodology proposed to be adopted by the party for carrying out the assignment.
- f) The shortlisted parties would have to deposit Earnest Money Deposit (EMD) as per prevailing rates along with the RFP which would be advised at the time of issue of RFP.

7. Interested parties may submit their Expression of Interest (EoI) in Forms-1 to 7 (attached) along with requisite documents to the below mentioned address latest by 5 pm on 29th May, 2015 in a sealed cover superscribed with the words **“ASSISTING THE STEERING COMMITTEE OF THE MINISTRY OF PETROLEUM & NATURAL GAS IN PREPARATION OF AN ANALYTICAL REPORT FOR LAUNCHING THE “MAKE IN INDIA” CAMPAIGN IN THE OIL & GAS SECTOR”:**

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8. Last date/ time for submitting the EOI is 29th May, 2015 by 5.00 PM. EOIs received after the last date/ time shall be rejected.
9. Scheduled time for completion of the study: **2 (Two) months** from the date of award of job.

CONSULTANT'S ORGANISATION AND EXPERINCE

A- Consultant's Organisation

(Provide here a brief description of the background and organisation of your firm/entity/entity and each associate for this assignment/job. The brief description should include ownership details, date and place of incorporation of the consultancy (attach certificate), objectives of the consultancy etc. Also if the consultant has formed an Association, details of each member of the Association, name of lead members etc. shall be provided).

1. General Information

General Information Form

1. Name of the Company/ Firm:
2. (Attach an attested photocopy of Certificate of Registration.)
3. Legal Status of the Firm:
4. Registered Address, telephone, Tele-fax.
5. Contact Person, Designation and Address including email ID
6. Length of experience in the field of conducting Investment Facilitation
7. Names and Addresses of Associated Companies to be involved in the Project and whether Parent/Subsidiary/others. (The relationship to be indicated)
8. In case the company is a subsidiary, the involvement, if any, of the Parent Company in the project
9. State whether the in-house expertise is available for all services/sub-systems. If not, details of sub-consultants to be involved in the project.
10. Has the applicant or any constituent partner in case of partnership firm, ever been debarred/blacklisted for competing in any organization at any time? If so, give details
11. Financial Strength (as per the audited statements):

Financial Year	2011-12	2012-13	2013-14
Total Turnover (Rs. crore)			

12. Has the Bidder or any constituent partner in case of partnership firm, ever been convicted?
13. Bids shall remain valid for 180 days after the date of Bid opening prescribed by the Authority?
14. Permanent account Number (PAN) and Sales Tax/ VAT/ Service Tax Registration number

Signature of the Bidder/ Authorized representative

B- Consultant's Experience

2.1 Experience of rendering consultancy services to Central Government/ State Governments in India for attracting investments and domestic manufacturing

(Using the format below provide information on each assignment for which your agency has provided consultancy as required under this assignment. In case, the information required by PPAC is not provided by the Bidder, PPAC shall proceed with evaluation based on information provided and shall not request the consultant for further information. Hence, the responsibility for providing complete information as required in this form lies solely with the consultant.)

Please provide details for each relevant project separately.

Assignment Name:	Approx. value of the contract (In Indian Rupees) : (Mention contract value in INR or provide range values: Upto Rs. 10 to 25 lakh, Rs 25 -50 lakh, Rs 50 lakh -2 crore, Rs 2 crore to 5 crore, > 5 crore
Location within the country	
Name of the Employer:	
Address:	
Start Date (month/year) Completion date (month/year):	Duration of assignment (months): Total no. of staff-months of the assignment:
Name of senior professional staff of your consultancy involved and functions performed	
Name of associated Consultants, if any:	
Narrative description of Project:	
Description of actual services provided by your staff within the assignment:	

2.2 International experience of rendering consultancy services to Central/ State/ Local Governments Globally for attracting investments and promoting domestic manufacturing in that country

(Using the format below provide information on each assignment for which your agency has provided consultancy as required under this assignment. In case, the information required by PPAC is not provided by the Bidder, PPAC shall proceed with evaluation based on information provided and shall not request the consultant for further information. Hence, the responsibility for providing complete information as required in this form lies solely with the consultant.)

Please provide details for each relevant project separately.

Assignment Name:	Approx. value of the contract (In Indian Rupees) : (Mention contract value in equivalent INR or provide range values: Upto Rs. 10 to 25 lakh, Rs. 25 -50 lakh, Rs. 50 lakh -2 crore, Rs. 2 crore. to 5 crore, > 5 crore.
Country: Location within the country	
Name of the Employer:	
Address:	
Start Date (month/year) Completion date (month/year):	Duration of assignment (months): Total no. of staff-months of the assignment:
Name of senior professional staff of your consultancy	
Name of associated Consultants, if any:	
Narrative description of Project:	
Description of actual services provided by your staff within the assignment:	

2.3 Specific experience of Consultant in the field of domestic Oil & Gas sector on issues related to investment climate, investment decisions, etc.

(Using the format below provide information on each assignment for which your Agency has provided consultancy to the Oil & Gas sector across India, as required under this assignment. In case, the information required by PPAC is not provided by the consultant, PPAC shall proceed with evaluation based on information provided and shall not request the consultant for further information. Hence, the responsibility for providing complete information as required in this form lies solely with the consultant.)

Please provide details for each relevant project separately.

Assignment Name:	Approx. value of the contract (In Indian Rupees) : (Mention contract value in INR or provide range values: Upto Rs. 10 to 25 lakh, Rs. 25 -50 lakh, Rs. 50 lakh -2 crore, Rs. 2 crore. to 5 crore, > 5 crore.
Country: Location within the country	
Name of the Employer:	
Address:	

Start Date (month/year) Completion date (month/year):	Duration of assignment (months): Total no. of staff-months of the assignment:
Name of senior professional staff of your consultancy involved and functions performed	
Name of associated Consultants, if any:	
Narrative description of Project:	
Description of actual services provided by your staff within the assignment:	

2.4 On field experience in conducting stakeholders consultation

(Using the format below provide information on each assignment for which your agency has provided consultancy as required under this assignment. In case, the information required by PPAC is not provided by the Bidder, PPAC shall proceed with evaluation based on information provided and shall not request the consultant for further information. Hence, the responsibility for providing complete information as required in this form lies solely with the consultant.)

Assignment Name:	
Country: Location within the country	
Name of the Employer:	
Address:	
Start Date (month/year) Completion date (month/year):	Duration of assignment (months): Total no. of staff-months of the assignment:
Name of senior professional staff of your consultancy involved and functions performed	
Name of associated Consultants, if any:	
Narrative description of Project:	
Description of actual services provided by your staff within the assignment:	

COMMENTS AND SUGGESTIONS ON THE TERMS OF REFERENCE

A – On the Terms of Reference

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

B - On Inputs and Facilities to be provided by the Employer

The Employer would render necessary support in terms of information/ discussions/ documents/ field visits/ coordination with other agencies and logistics, wherever considered necessary in completion of the Project. The employer will interact with the Consultant for exchange of documents/ information and discussion

DESCRIPTION OF APPROACH, METHODOLOGY, WORK PLAN, PROJECT ORGANISATION FOR PERFORMING THE ASSIGNMENT/JOB

Technical approach, methodology, work plan and project organization are key components of the EOI. The Consultant must present his/her Technical Proposal divided into the following components:

- a) Technical Approach and Methodology
- b) Work Plan, and
- c) Project organization and availability of experts
 - a) Technical Approach and Methodology: In this section, the consultants should explain their understanding of the objectives of the assignment/ job, approach to the assignment/ job, methodology for carrying out the activities (including proposed stakeholder consultation) and obtaining the expected output, and the degree of detail of such output. The consultants should highlight the problems being addressed and their importance, and explain the technical approach they would adopt to address them. The consultants should also provide an overview of tools and methodologies that they propose to adopt for evaluation. The consultants should also provide the list of stakeholders proposed to be consulted and the method of conducting stakeholder consultation.
 - b) Work Plan: The consultant should propose and justify the main activities of the assignment/ job, their content and duration, phasing and interrelations, milestones (including interim approvals by the Employer), and key performance indicators. The proposed work plan should be consistent with the technical approach and methodology, showing clear understanding of the TOR and ability to translate them into a feasible working plan. A list of the deliverable outcomes should be included here. More specifically the consultant should:
 - ❖ Highlight how he/ she would proceed to meet the project requirements,
 - ❖ Highlight number of hours he/ she estimates are required to complete the work,
 - ❖ Propose number of resources for providing these services,
 - ❖ Highlight tools and methodologies to be used for this effort, and
 - ❖ State how he/ she would manage the complexity of the project
 - c) Project organization and availability of experts: The consultant should propose and justify the structure and composition of his/ her team. He/ she should list out the main disciplines of the assignment/ job, the key expert responsible, and proposed technical and support staff. More specifically, an overview on senior leadership coverage and commitment may be provided and expertise in investment and domestic manufacturing related works highlighted.

TEAM COMPOSITION AND TASK ASSIGNMENT/ JOBS

Professional Staff

S. No.	Name of Staff	Area of Expertise	Post/Task Assigned for this job

CURRICULUM VITAE (CV) FOR PROPOSED PROFESSIONAL STAFF

1. Proposed Position:

[For each position of key professional, a separate Form-5 should be prepared]

2. Name of Firm/entity:

(Insert name of consultancy proposing the staff):

3. Name of Staff:

(Insert full name):

4. Date of Birth:

5. Nationality:

6. Education:

7. Membership of Professional Associations:

8. Other Training:

9. Countries of Work Experience:

10. Languages Known:

11. Employment Record:

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

From [Year]:

To [Year]:

Employer: Positions held:

12. Detailed Tasks Assigned

[List all tasks to be performed under this assignment/ job]

13. Work Undertaken that best illustrates capability to handle the tasks assigned:

[Among the assignment/ jobs in which the staff has been involved, indicate the following information for those assignment/ jobs that best illustrate staff capability to handle the tasks listed under point 12.]

Name of assignment/ job or project: Year:

Location:

Main project features: Positions held:

Activities performed:

14. Certification:

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

Date: Place:

[Signature of staff member or authorized representative of the staff]

[Full name of authorized representative]:

WORK SCHEDULE

Sl. No.	Name of Activity	Activity Weeks							
		W1	W2	W3	W4	W5	W6	W7	W8
1.									
2.									
3.									
4.									
5.									
6.									
7.									

1. Indicate all main activities of the assignment/ job including delivery of reports (e.g., inception, interim, draft and final reports), and other benchmarks such as Employer approvals. For phased assignment/ jobs indicate activities, delivery of reports, and benchmarks separately for each phase.
2. Duration of activities should be indicated in the form of a Bar Chart.

(Undertaking on Letter Head)

We, M/s _____, having our registered office at _____ certify that we have not been blacklisted for work related to studies/ surveys by Central Government, State Government, Union Territory or Public Sector Undertaking office in India. We undertake to indemnify PPAC for all costs incurred in respect of conducting **ASSISTING THE STEERING COMMITTEE OF THE MINISTRY OF PETROLEUM & NATURAL GAS IN PREPARATION OF AN ANALYTICAL REPORT FOR LAUNCHING THE “MAKE IN INDIA” CAMPAIGN IN THE OIL & GAS SECTOR.**

PPAC shall have the right to terminate the work order in the event of finding out that we have been blacklisted for work and claim damages/ costs incurred or suppressing information or providing incorrect information.

Further certified that the signer of this undertaking is duly authorized to give this undertaking.

Place

Name/ Designation of Authorized Signatory

Date:

Name of Organization

Seal

ASSISTING THE STEERING COMMITTEE OF THE MINISTRY OF PETROLEUM & NATURAL GAS IN PREPARATION OF AN ANALYTICAL REPORT FOR LAUNCHING THE “MAKE IN INDIA” CAMPAIGN IN THE OIL & GAS SECTOR

Check List

Criteria	Element	Minimum required	Yes or No
About the Firm	No. of years in existence	5 years or more	
	Minimum Turnover (in at least 2 of the 3 preceding financial years)	Rs. 20 crores	
	Energy Advisory experience	5 years or more	
Past Performance Assessment	Program management support in attracting investments and domestic manufacturing	3 or more projects	
	International experience on promoting domestic manufacturing in that country	3 or more projects	
	Investment climate, investment decisions in the Oil & Gas sector	3 or more projects	
	Conducting Stakeholder interaction	1 or more assignment	
Key Personnel	Manufacturing Policy Expert	1 or more Expert	
	Global Investment Expert	1 or more Expert	
	Oil & Gas Expert	1 or more Expert	