



United Nations Procurement Division

REQUEST FOR INFORMATION (RFI)

This notice is placed by UNPD. The accuracy, reliability and completeness of the contents of furnished information is the responsibility of United Nations Procurement Division. You are therefore requested to direct all queries regarding this RFI to United Nations Procurement Division using the fax number or e-mail address provided below.

Title of the RFI:

Request for information for ESG & Climate, Data and Research for the United Nations Joint Staff Pension Fund (UNJSPF)

Date of this RFI: 28 December 2022

Closing Date for Receipt of RFI: 6 January 2023

RFI Number: RFIUNPD20647

Beneficiary Country/Territory: United States of America

Commodity/Service category: Financial Services

Address RFI response by fax or e-mail to the Attention of: Ricardo Velez Castellon

Fax Number: By email only

E-mail Address: ricardo.velezcastellon@un.org

UNSPSC Code: 64000000, 80100000, 84000000

DESCRIPTION OF REQUIREMENTS

Purpose:

The United Nations Joint Staff Pension Fund (UNJSPF) is seeking information on qualified vendors who can provide the following services:

- Detailed and specific ESG research and rating on individual companies (MSCI ACWI IMI) as well as sectors
- Detailed controversy assessment on individual companies of the MSCI ACWI IMI
- Specific ESG data points, including, but not limited to, tobacco, weapons and fossil fuel exposure on individual companies of the MSCI ACWI IMI
- Carbon data for i) equities in the MSCI ACWI IMI ii) corporate bonds iii) real estate private companies as well as carbon footprint datafiles for several sub-asset classes such as green bonds.\
- Be able to deliver the above services online and via FTPs.



Background:

The UNJSPF is a defined benefit plan established by the General Assembly of the UN to provide retirement, death, disability and related benefits for the staff of the UN and 24 other organizations admitted to membership of the Fund. The Fund is administered by the United Nations Joint Staff Pension Board, the Chief Executive of Pension Administration and the Staff Pension Committees of member organizations. The Board reports to the General Assembly. The UNJSPF manages much of its investments internally. The General Assembly, through the Fund's Regulations, has given the fiduciary responsibility of the investment of the Fund's assets to the Secretary-General who, in turn, has delegated this responsibility to their Representative. The Office of Investment Management (OIM) assists the Representative of the Secretary-General (RSG) in investing the assets of the Fund.

As of 31 December 2021, the UNJSPF had 137,261 participants and 82,312 beneficiaries in receipt of a periodic benefit, with assets of \$91bn in market value. Although the base currency is US dollars, the Fund's participants and beneficiaries are distributed around the world, with some beneficiaries having the option of their benefits increasing with local inflation, rather than with US CPI. The UNJSPF investments are globally diversified. Although most of the exposure is in major developed markets, the Fund is committed to finding sound investment opportunities in emerging markets and development-related areas. As of 31 December 2021, the asset allocation was 57.1% in public equities, 24.8% in fixed income, 7.1% in real estate, 7.1% in private equity and 3.9% in short-term holdings. The assets were invested in 92 countries, 7 regions and 42 currencies.

SPECIFIC REQUIREMENTS / INFORMATION (IF ANY)

The provider should:

- Be a recognized player of ESG with a track record of at least 10 years
- Work with major asset owners
- Have at least 150 ESG analysts along with technological capabilities

NOTE

Information on tendering for the UN Procurement System is **available free of charge** at the following address: <https://www.ungm.org/Public/Notice>

Only the United Nations Global Marketplace (UNGM) has been authorised to collect a nominal fee from vendors that wish to receive automatically Procurement Notices or Requests for Expression Of Interest. Vendors interested in this Tender Alert Service are invited to subscribe on <http://www.ungm.org>

Vendors interested in participating in a potential future solicitation process should submit the Vendor Response Form of this RFI electronically (through the link available on the next page) before the closing date set forth above.



VENDOR RESPONSE

NOTICE

- Companies can only participate in solicitations of the UN Secretariat after completing their registration (free of charge) at the United Nations Global Marketplace (www.ungm.org).
- Please verify that your company is registered under its **full legal** name on the United Nations Global Market Place (www.ungm.org) and that your application for registration as vendor has been submitted to the **UN Secretariat** in the same site, to be able to participate in any potential solicitation process as a result of this RFI.
- While companies can participate in solicitations after completion of registration at Basic Level, we strongly recommend all companies to register at least at **Level 1** under the United Nations Secretariat prior to participating in any solicitations.

PLEASE NOTE: You should submit your response to this RFI electronically at:

<https://www.un.org/Depts/ptd/node/add/interest-expressed?EOI=RFIUNPD20647>

In case you have difficulties submitting your response electronically, please contact ricardo.velezcastellon@un.org directly for instructions.



RFI INSTRUCTIONS

1) Registering as a Vendor with the United Nations

Vendors interested in fulfilling the requirement described above must be registered at the UN Global Marketplace (www.ungm.org) with the UN Secretariat in order to be eligible to participate in any solicitation. Information on the registration process can be found at <https://www.un.org/Depts/ptd/vendors>.

Prerequisites for Eligibility

In order to be eligible for UN registration, you must declare that:

- A. Your company (as well as any parent, subsidiary or affiliate companies) is not listed in, or associated with a company or individual listed in:
 - I. the Compendium of United Nations Security Council Sanctions Lists (<https://www.un.org/sc/suborg/en/sanctions/un-sc-consolidated-list>), or
 - II. the IIC Oil for Food List website or, if listed on either, this has been disclosed to the United Nations Procurement Division in writing.
- B. Your company (as well as any parent, subsidiary or affiliate companies) is not currently removed or suspended by the United Nations or any other UN organisation (including the World Bank);
- C. Your company (as well as any parent, subsidiary or affiliate companies) is not under formal investigation, nor have been sanctioned within the preceding three (3) years, by any national authority of a United Nations Member State for engaging or having engaged in proscribed practices, including but not limited to: corruption, fraud, coercion, collusion, obstruction, or any other unethical practice;
- D. Your company has not declared bankruptcy, are not involved in bankruptcy or receivership proceedings, and there is no judgment or pending legal action against your company that could impair your company's operations in the foreseeable future;
- E. Your company does not employ, or anticipate employing, any person(s) who is, or has been a UN staff member within the last year, if said UN staff member has or had prior professional dealings with the Vendor in his/her capacity as UN staff member within the last three years of service with the UN (in accordance with UN post-employment restrictions published in ST/SGB/2006/15).
- F. Your company undertakes not to engage in proscribed practices (including but not limited to: corruption, fraud, coercion, collusion, obstruction, or any other unethical practice), with the UN or any other party, and to conduct business in a manner that averts any financial, operational, reputational or other undue risk to the UN.

For Registered Vendors: Vendors already registered at the UN Global Marketplace with the UN Secretariat must ensure that the information and documentation (e.g. financial statements, address, contact name, etc.) provided in connection with their registration are up to date in UNGM. Please verify and ensure that your company is registered under its full legal name.

For Vendors Interested in Registration: Vendors not yet registered should apply for registration on the United Nations Global Marketplace (<http://www.ungm.org>); information on the registration process can be found at <https://www.un.org/Depts/ptd/vendors>. Vendors must complete the registration process prior to the closing date of the RFI. Vendors who have not completed the UNGM registration process with the UN Secretariat before the closing date of the RFI are not considered eligible to participate in the potential solicitation process related to the RFI. We strongly recommend all companies to register at least at Level 1 under the UN Secretariat prior to participating in any solicitations.

IMPORTANT NOTICE: Any false, incomplete or defective vendor registration may result in the rejection of the application or cancellation of an already existing registration.

2) RFI Process

Vendors interested in participating in the potential solicitation process should forward their information (as requested in the RFI) to United Nations Procurement Division (UNPD) by the closing date set forth in this RFI. *Due to the high volume of communications UNPD is not in a position to issue confirmation of receipt of RFIs.*

Please note that no further details of the potential solicitation can be made available to the vendors prior to issuance of the solicitation documents.

This RFI is issued subject to the conditions contained in the RFI introductory page available at <https://www.un.org/Depts/ptd/rfi>.

