



Terms of Reference

Appointment of an ICT Service Provider to build a Product Registration Database and Reporting System for the Department of Energy's Residential Appliance Standards and Labelling (S&L) Programme

Application Deadline: 18 April 2018

Category: Standards and Labelling

Type of Contract: Institutional / Professional Services Contract

Languages Required: English

Starting Date: 01 May 2018

Expected Duration of Assignment: 11 months

1. INTRODUCTION AND BACKGROUND

The South African government through the Department of Energy (DoE) in collaboration with the Department of Trade and Industry (the dti), and the United Nations Development Programme (UNDP) is implementing the project "Market Transformation through the Introduction of Energy Efficiency Standards and the Labelling of Household Appliances in South Africa". The objectives are removing inefficient electronic appliances from the South African market and encouraging adoption of efficient technologies by implementing measures/interventions such as minimum energy performance standards (MEPS), labelling programs, and incentive programs. The overarching goal is to reduce electricity consumption and the carbon footprint of the residential sector.

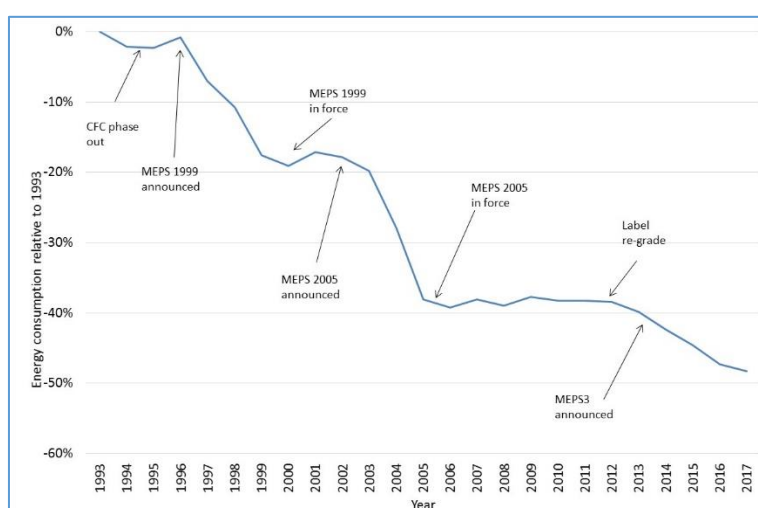
The Department of Energy have identified a need for improved product registration systems and database within the S&L program, in particular improvements in data collection practices and service delivery. To this end, an ICT service provider is being sought to build a database and reporting system.

Naturally, software developers will need to rely on appropriately defined business rules, which consider both strategic and operational matters. A study (to be provided on request) which reviewed the current regulatory requirements and operating procedures developed the business rules which are to be used as the reference source for the development of a new registration/database system. The identification of an appropriate dataset for collection by the regulator from industry has been designed to be as comprehensive as possible, whilst being mindful not to place unnecessary or excessive burdens on industry. It is envisioned that the new registration/database system will facilitate a range of functions, either as direct inputs/outputs from the system or as related research projects that rely on a detailed analysis of downloads of data sets from the database:

- A platform for suppliers to demonstrate compliance with regulatory requirements
- The reporting of program outcomes including product efficiency trends and reductions in CO₂-e emissions (as an example see Figure 1 below which illustrates the type of analysis that can be undertaken in circumstances where a robust database is readily available)

- Evaluation of the program over time (energy, cost and environmental impacts) with consequent input into national energy planning and energy efficiency policy
- A future basis for the setting of more stringent minimum energy performance standards and or the introduction of new appliances to the program
- The delivery of monitoring verification and enforcement activities, including a basis in law for action, should industry fail to meet the requirements of the program, in particular to only offer for sale registered products, compliant with the relevant standards with representative claims for performance
- Readily available data to support customs activities
- The delivery of public information programs
- The facilitation of allied energy efficiency programs such as incentive programs for consumers to purchase more efficient appliances and equipment
- Identification of strengths and weaknesses in program implementation to allow for corrective action
- A database of stakeholder contacts
- Enablement of potential future regional co-operation

Figure 1: Trends in the Energy Consumption of Australian Refrigerators (1993 – 2017)



2. SCOPE AND EXTENT OF WORK

The appointed firm will be required to do the following work:

- Develop / build the databases and portal in accordance with the business rules and product and functional requirements. Interest parties must request the functional specifications report from **procurement.enquiries.za@undp.org**. The portal design and databases must be tested before being made operational, the sign off will be completed by the project management team, before 15 December 2018
- The service provider shall propose a suitable development platform for the portal and databases that adequately meets the business rules and functional requirements. The service provider should list reasons for the choice of the preferred development language and databases in the following manner:
 - a. Development language (eg. ASP.net, Php, Html 5 etc.)
 - b. Database (eg. MYSQL, MS SQL, Oracle etc.)
 - c. With regards to the content management, the portal should have user-friendly administration control panel for updating of the portal with different user access levels capabilities. The service provider is requested to identify a CMS that is available. DoE highly recommends available free open source content

management control panels which are easy to update to later versions and the service provider is expected to make convincing arguments on their choice of CMS (eg. Joomla, Drupal). It should be noted that any CMS will require a relatively extensive degree of customization so as to accommodate the more complex requirements of the facility, selection of a CMS should account for this fact.

- d. The portal & database should be hosted by a suitable cloud platform during the development and post development phases (e.g. Hetzner, Afrihost etc.). Hosting should be for 18 months. This is beyond the build period but must be included in the contract price to allow for an orderly handover to the relevant government department.
- e. Design appropriate security architecture for the portal and database and implement this security feature in order to avoid hackers easily accessing the control panel.
- f. Source code must be delivered on USB to DoE.
- g. Provide adequate training to DoE personnel and relevant stakeholders with regards to portal & database so that they can effectively operate, update and maintain the portal and database regularly. The training should cater for personnel without prior knowledge of programming.
- a. Any Content Management Systems that may be employed and how these will be customized so as to accommodate the more complex requirements of the facility).

3. FRAMEWORK OF PROPOSED DELIVERABLES

The project is divided into 2 phases. Whilst the initial objective is to complete Phase 1 and have it operational by December 15, 2018, the requirements associated with Phase 2 of this project must be able to be accommodated within the overall structure developed in Phase 1. In particular, the hardware and software selected and programming developed for Phase 1 must also be capable of accommodating the requirements of Phases 2 without the need for the rebuilding of components developed in Phase 1.

Deliverable	Output	Payment Milestones	Due By
1. A detailed workplan	Report	10%	Within 14 days of contract signing
2. Progress report	Evidence that system development is in line with project workplan and must include mock-ups of each of the key pages within the system for approval by stakeholders	20%	Within 3 months of contract signing
3. User Acceptance Testing (UAT)	Test site to be made available to start testing. The test site is to include at least three applicant user portals, a regulator assessor portal and a regulator manager portal	20%	Within 6 months of contract signing
4. System approved (following completion of amendments as	System live	30%	Within 7 months of contract signing

identified as necessary in the feedback from the UAT) and implementation date agreed (End of Phase 1)			
5. Remaining system components, namely public portal, regulator's portal store survey facility and check-test facility. System approved (following completion of amendments as identified as necessary in the feedback from the UAT) and implementation date agreed (Phase 2)	System live and operational	20%	Within 11 months of contract signing

4. DUTIES AND RESPONSIBILITIES

The successful proposer will:

- Draw on work already done in this area to avoid duplication, specifically the Product Registration Database Study (Annex 1);
- Ensure familiarity with the topic, the mandatory product registration requirements and the governing standards;
- Engage with the project team throughout the database development process;
- Report to the PM and to the Project Management Team (PMT) on completion of each deliverable for discussion and validation. Meetings will be held with the PMT at the end of each deliverable where the next steps of the programme will be agreed;
- Treat project details and information with confidentiality, as required;
- Must demonstrate experience and competence as detailed in the scope of work above; and
- Submit an all-inclusive fully itemized fixed price proposal

5. DELIVERY TIMELINE

The work should be completed within 11 months of signing of the contract. 7 months to develop the database system and then 4 months for testing and to develop the remaining components of the database

The contract sum (accepted tender quotation) must be inclusive of all works needed to complete the web facility, including minor and incidental works not necessarily covered in this specification but nevertheless required to deliver a fully functioning website. Costing proposals should be split into Phase1 and Phase 2.

6. ADMINISTRATION

The ICT service provider is required to be based in the Republic of South Africa but will not be required to work on site. They will however be required to attend meetings at the Department of Energy in Pretoria as required, subject to a reasonable notice period.

All facilities and resources required to deliver on the scope of work should be covered / provided and costed into the proposal. This includes cost of any required software, licensing costs, server rental, installation & initial data input, (including backup facilities), hosting fees, SSL fees, backup services, maintenance services travel etc. Each of these items should be separately quantified in the tender bid.

7. CRITERIA FOR SELECTION

Selection will be based on a combined scoring method, where the approach to the work, qualifications and experience (Technical proposal) will be weighted a maximum of 70%, and combined with the price offer (Financial proposal) which will be weighted a maximum of 30%. Using UNDP's procurement rules, the selection of the successful firm will be aimed at maximising the overall qualities in the following areas (weighting applied to each quality is shown in brackets, summing to 800 points). The breakdown of each component is provided as Annex A

Proposed Work Plan and Approach: a technical proposal detailing the approach and methodology to be adopted and which adequately address the project requirements. **400 points.**

Personnel: Qualification /suitability for the Project/Language Qualifications. **160 points**

Expertise of Firm: Number of projects/instances where the firm has provided services of a comparable nature (provide exact details). Provide at least 3 verifiable relevant project references. **240 points.**

RESPONSE FORMAT

To facilitate the analysis of responses, all interested parties are required to prepare their response in accordance with the instructions outlined in this section. All proposals should be electronically generated.

Applicants are required to submit the following:

- A Technical Proposal: (i) Letter of Interest, stating why you consider your service suitable for the assignment; and (ii) a brief methodology on the approach and implementation of the assignment, including broad time-frame (phases), and well-defined deliverables in relation to the scope of work, the costs per deliverable(s);
- Evidence and examples of similar projects that have been successfully completed;
- Personal CVs of team members highlighting qualifications and experience in similar projects;
- Work references - contact details (e-mail addresses) of referees (organisation for whom you've produced similar assignments);
- All-inclusive financial proposal indicating consultancy fee (South African Rand) and a breakdown of expenses (unit price together with any other expenses) related to the assignment. The proposal must incorporate all travel costs anticipated for the firm to achieve the required deliverables.

Applicants are required to submit the above documents to **procurement.za@undp.org** on or before the **18 April 2018** with the subject line: **Job Title and Reference Number**.

Annex A

Evaluation Breakdown

Summary of Technical Proposal Evaluation Forms		Score Weight	Points Obtainable
1	Expertise of Firm / Organization	30%	240
2	Proposed Methodology, Approach and Implementation Plan	50%	400
3	Management Structure and Key Personnel	20%	160
Total			800

Technical Proposal Evaluation Form 1		Points obtainable
Expertise of the Firm/Organization		
1.1	Reputation of Organization and Staff / Credibility / Reliability / Industry Standing	30
1.2	General Organizational Capability which is likely to affect implementation <ul style="list-style-type: none"> - Financial stability - loose consortium, holding company or one firm - age/size of the firm - strength of project management support - project financing capacity - project management controls 	60
1.3	Extent to which any work would be subcontracted (subcontracting carries additional risks which may affect project implementation, but properly done it offers a chance to access specialised skills.)	15
1.4	Quality assurance procedures, warranty	15

1.5	Relevance of: <ul style="list-style-type: none"> - Specialised Knowledge - Experience on Similar Programme / Projects - Experience on Projects in the Region Work for UNDP/ major multilateral/ or bilateral programmes	120
		240

Technical Proposal Evaluation Form 2		Points Obtainable
Proposed Methodology, Approach and Implementation Plan		
2.1	To what degree does the Proposer understand the task?	30
2.2	Have the important aspects of the task been addressed in sufficient detail?	25
2.3	Are the different components of the project adequately weighted relative to one another?	20
2.4	Is the proposal based on a survey of the project environment and was this data input properly used in the preparation of the proposal?	55
2.5	Is the conceptual framework adopted appropriate for the task?	65
2.6	Is the scope of task well defined and does it correspond to the TOR?	120
2.7	Is the presentation clear and is the sequence of activities and the planning logical, realistic and promise efficient implementation to the project?	85
		400

Technical Proposal Evaluation Form 3			Points Obtainable
Management Structure and Key Personnel			
3.1	Team Leader		75
		Sub-Score	
	General Qualification		70
	Suitability for the Project		
	- International Experience	10	
	- Training Experience	10	
	- Professional Experience in the area of specialization	35	
	- Knowledge of the region	15	
	- Language Qualifications	5	
		75	
3.2	Senior Expert / Web Developer		50
		Sub-Score	
	General Qualification		45
	Suitability for the Project		
	- International Experience	5	
	- Training Experience	5	
	- Professional Experience in the area of specialization	25	
	- Knowledge of the region	10	
	- Language Qualifications	5	
		50	
3.3	Other Team Members		35
		Sub-Score	
	General Qualification		30
	Suitability for the Project		
	- International Experience	5	
	- Training Experience	5	

	- Professional Experience in the area of specialization	15		
	- Knowledge of the region	5		
	- Language Qualification		5	
			35	
	Total Part 3			160