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REQUEST FOR PROPOSAL RFP 096/18

NAME & ADDRESS OF FIRM	DATE: November 7, 2018
	REFERENCE: Development of energy efficient appliances purchase promotion campaign .

Dear Sir / Madam:

We kindly request you to submit your Proposal for **Development of energy efficient appliances purchase promotion campaign (the detailed TOR is attached separately as Annex 1a)**.

Please be guided by the form attached hereto as Annex 2, in preparing your Proposal.

Proposals need to be submitted on or before **22 November 2018, 4:00 pm** local Yerevan time (GMT +4) via email, courier mail to the address below:

United Nations Development Programme / UNDP
14 Petros Adamyan St., Yerevan 0010, Republic of Armenia

Or submit via e-mail to the following e-mail address: tenders.armenia@undp.org
Proposals submitted by email must be limited to a maximum of 10MB, virus-free and no more than 3 transmissions. They must be free from any form of virus or corrupted contents, or the quotations shall be rejected.

Please note that proposals received through any other e-mail address will not be considered.

Your Proposal must be expressed in the English, and valid for a minimum period of 60 calendar days.

In the course of preparing your Proposal, it shall remain your responsibility to ensure that it reaches the address above on or before the deadline. Proposals that are received by UNDP after the deadline indicated above, for whatever reason, shall not be considered for evaluation. If you are submitting your Proposal by email, kindly ensure that they are signed and in the .pdf format, and free from any virus or corrupted files.

Services proposed shall be reviewed and evaluated based on completeness and compliance of the Proposal and responsiveness with the requirements of the RFP and all other annexes providing details of UNDP requirements.

The Proposal that complies with all of the requirements, meets all the evaluation criteria and offers the best value for money shall be selected and awarded the contract. Any offer that does not meet the requirements shall be rejected.

Any discrepancy between the unit price and the total price shall be re-computed by UNDP, and the unit price shall prevail and the total price shall be corrected. If the Service Provider does not accept the final price based on UNDP's re-computation and correction of errors, its Proposal will be rejected.

No price variation due to escalation, inflation, fluctuation in exchange rates, or any other market factors shall be accepted by UNDP after it has received the Proposal. At the time of Award of Contract or Purchase Order, UNDP reserves the right to vary (increase or decrease) the quantity of services and/or goods, by up to a maximum twenty five per cent (25%) of the total offer, without any change in the unit price or other terms and conditions.

Any Contract or Purchase Order that will be issued as a result of this RFP shall be subject to the General Terms and Conditions attached hereto. The mere act of submission of a Proposal implies that the Service Provider accepts without question the General Terms and Conditions of UNDP, herein attached as Annex 3.

Please be advised that UNDP is not bound to accept any Proposal, nor award a contract or Purchase Order, nor be responsible for any costs associated with a Service Providers preparation and submission of a Proposal, regardless of the outcome or the manner of conducting the selection process.

UNDP's vendor protest procedure is intended to afford an opportunity to appeal for persons or firms not awarded a Purchase Order or Contract in a competitive procurement process. In the event that you believe you have not been fairly treated, you can find detailed information about vendor protest procedures in the following link:

<http://www.undp.org/content/undp/en/home/operations/procurement/protestandsanctions/>

UNDP encourages every prospective Service Provider to prevent and avoid conflicts of interest, by disclosing to UNDP if you, or any of your affiliates or personnel, were involved in the preparation of the requirements, design, cost estimates, and other information used in this RFP.

UNDP implements a zero tolerance on fraud and other proscribed practices, and is committed to preventing, identifying and addressing all such acts and practices against UNDP, as well as third parties involved in UNDP activities. UNDP expects its Service Providers to adhere to the UN Supplier Code of Conduct found in this link : http://www.un.org/depts/ptd/pdf/conduct_english.pdf

Thank you and we look forward to receiving your Proposal.

Sincerely yours,

Procurement Unit / UNDP Armenia

Description of Requirements

Context of the Requirement	Development of energy efficient appliances purchase promotion campaign
Implementing Partner of UNDP	N/A
Brief Description of the Required Services ¹	The task objective is to develop the roadmap of energy efficient appliances purchase promotion campaign. For more details please see attached Terms of Reference (TOR), Annex 1a
List and Description of Expected Outputs to be Delivered	Please see attached Terms of Reference (TOR), Annex 1a
Person to Supervise the Work/Performance of the Service Provider	“Regulatory framework to promote Energy Efficiency in countries of the Eurasian Economic Union” Project Manager
Frequency of Reporting	<i>weekly</i>
Progress Reporting Requirements	On regular basis
Location of work	<input type="checkbox"/> Exact Address/es <i>[pls. specify]</i> <input checked="" type="checkbox"/> At Contractor’s Location
Expected duration of work	120 days
Target start date	December, 2018
Latest completion date	April, 2019
Travels Expected	As per TOR, Annex 1a
Special Security Requirements	<input type="checkbox"/> Security Clearance from UN prior to travelling <input type="checkbox"/> Completion of UN’s Basic and Advanced Security Training <input type="checkbox"/> Comprehensive Travel Insurance <input checked="" type="checkbox"/> Not Required
Facilities to be Provided by UNDP (i.e., must be excluded from Price Proposal)	<input type="checkbox"/> Office space and facilities <input type="checkbox"/> Land Transportation <input checked="" type="checkbox"/> Not Required
Implementation Schedule indicating breakdown and timing of activities/sub-activities	<input checked="" type="checkbox"/> Required <input type="checkbox"/> Not Required
Names and curriculum vitae of individuals who will be involved in completing the services	<input checked="" type="checkbox"/> Required <input type="checkbox"/> Not Required

¹ A detailed TOR may be attached if the information listed in this Annex is not sufficient to fully describe the nature of the work and other details of the requirements.

Currency of Proposal	<input checked="" type="checkbox"/> United States Dollars <input type="checkbox"/> Euro <input checked="" type="checkbox"/> Local Currency																	
Value Added Tax on Price Proposal ²	<input type="checkbox"/> must be inclusive of VAT and other applicable indirect taxes <input checked="" type="checkbox"/> must be exclusive of VAT and other applicable indirect taxes																	
Validity Period of Proposals (<i>Counting for the last day of submission of quotes</i>)	<input checked="" type="checkbox"/> 60 days <input type="checkbox"/> 90 days <input type="checkbox"/> 120 days In exceptional circumstances, UNDP may request the Proposer to extend the validity of the Proposal beyond what has been initially indicated in this RFP. The Proposal shall then confirm the extension in writing, without any modification whatsoever on the Proposal.																	
Partial Quotes	<input checked="" type="checkbox"/> Not permitted <input type="checkbox"/> Permitted																	
Payment Terms ³	<table border="1"> <thead> <tr> <th>Outputs</th> <th>Percentage</th> <th>Timing</th> <th>Condition for Payment Release</th> </tr> </thead> <tbody> <tr> <td>The customers' awareness and retailers' capacities/willingness survey methodology, including interview sampling method timeline and questionnaires for the interviews is elaborated and agreed with the Project.</td> <td>30%</td> <td>1 month after contract signing</td> <td rowspan="3">Upon acceptance of services/deliverables by the manager of the "Regulatory framework to promote Energy Efficiency in countries of the Eurasian Economic Union" Project</td> </tr> <tr> <td>The survey is conducted, electronic database of the interviews and survey is compiled and submitted, and the report summarizing the key findings of the survey is drafted.</td> <td>30%</td> <td>3 months after contract signing</td> </tr> <tr> <td>The energy efficient purchases promotional campaign scenarios are developed, the most feasible scenario is</td> <td>40%</td> <td>4 months after contract signing</td> </tr> </tbody> </table>				Outputs	Percentage	Timing	Condition for Payment Release	The customers' awareness and retailers' capacities/willingness survey methodology, including interview sampling method timeline and questionnaires for the interviews is elaborated and agreed with the Project.	30%	1 month after contract signing	Upon acceptance of services/deliverables by the manager of the "Regulatory framework to promote Energy Efficiency in countries of the Eurasian Economic Union" Project	The survey is conducted, electronic database of the interviews and survey is compiled and submitted, and the report summarizing the key findings of the survey is drafted.	30%	3 months after contract signing	The energy efficient purchases promotional campaign scenarios are developed, the most feasible scenario is	40%	4 months after contract signing
Outputs	Percentage	Timing	Condition for Payment Release															
The customers' awareness and retailers' capacities/willingness survey methodology, including interview sampling method timeline and questionnaires for the interviews is elaborated and agreed with the Project.	30%	1 month after contract signing	Upon acceptance of services/deliverables by the manager of the "Regulatory framework to promote Energy Efficiency in countries of the Eurasian Economic Union" Project															
The survey is conducted, electronic database of the interviews and survey is compiled and submitted, and the report summarizing the key findings of the survey is drafted.	30%	3 months after contract signing																
The energy efficient purchases promotional campaign scenarios are developed, the most feasible scenario is	40%	4 months after contract signing																

² VAT exemption status varies from one country to another. Pls. check whatever is applicable to the UNDP CO/BU requiring the service.

³ UNDP preference is not to pay any amount in advance upon signing of contract. If the Service Provider strictly requires payment in advance, it will be limited only up to 20% of the total price quoted. For any higher percentage, or any amount advanced exceeding \$30,000, UNDP shall require the Service Provider to submit a bank guarantee or bank cheque payable to UNDP, in the same amount as the payment advanced by UNDP to the Service Provider.

	selected. The detailed program to implement energy efficient purchases promotion campaign is elaborated and agreed with the Project and the selected retailers.			
Person(s) to review/inspect/ approve outputs/completed services and authorize the disbursement of payment	Climate Change Program Coordinator of UNDP Country Office in Armenia			
Type of Contract to be Signed	<input type="checkbox"/> Purchase Order <input type="checkbox"/> Institutional Contract <input checked="" type="checkbox"/> Contract for Services <input type="checkbox"/> Long-Term Agreement ⁴ <input type="checkbox"/> Other Type of Contract			
Criteria for Contract Award	<input type="checkbox"/> Lowest Price Quote among technically responsive offers <input checked="" type="checkbox"/> Highest Combined Score (based on the 70% technical offer and 30% price weight distribution), where the minimum passing score of technical proposal is 70%. <input type="checkbox"/> Full acceptance of the UNDP Contract General Terms and Conditions (GTC). This is a mandatory criteria and cannot be deleted regardless of the nature of services required. Non acceptance of the GTC may be grounds for the rejection of the Proposal.			
Criteria for the Assessment of Proposal	<p><u>Technical Proposal (70%)</u></p> <p><input checked="" type="checkbox"/> <u>Expertise of the Firm - Maximum obtainable points: – 300</u></p> <ul style="list-style-type: none"> • Experience in performing of social surveys, preferably in energy saving, energy efficiency topics, max-100; • Experience in elaboration and implementation of customers’ choice guiding programs preferably in household appliances energy performance topics, max-100; • Detailed methodology of customers’ awareness and retailers capacities/willingness to guide the customers towards energy efficient purchases, including sampling methodology and questionnaires, max-100; <p><input checked="" type="checkbox"/> <u>Methodology, Its Appropriateness to the Condition and Timeliness of the Implementation Plan, technical capacity - Maximum obtainable points: 300</u></p> <ul style="list-style-type: none"> - Description of the task implementation methodology and workplan, max-300; - <p><input checked="" type="checkbox"/> <u>Management Structure and Qualification of Key Personnel - Maximum obtainable points: 400</u></p>			

⁴ Minimum of one (1) year period and may be extended up to a maximum of three (3) years subject to satisfactory performance evaluation. This RFP may be used for LTAs if the annual purchases will not exceed \$100,000.00.

	<ul style="list-style-type: none"> • Task Leader with at least 10 years of general professional experience, including 3 years in developing and implementing customer’s choice guiding campaigns, max-150; • Social survey expert with at least 7 years of experience in conducting and analyzing the results of social surveys, max-100; • The team of interviewers, with professional background experience of participation in at least 3 similar surveys, max-50; • Public Outreach specialists with at least 7 years of general professional experience, including implementation of at least 2 public outreach campaigns in energy saving/energy efficiency sectors, max-50; • Graphic designer with respective portfolio, max-50; <p>Financial Proposal (30%) To be computed as a ratio of the Proposal’s offer to the lowest price among the proposals received by UNDP.</p>
UNDP will award the contract to:	<input checked="" type="checkbox"/> One and only one Service Provider <input type="checkbox"/> One or more Service Providers, depending on the following factors: N/A
Annexes to this RFP ⁵	<input checked="" type="checkbox"/> Form for Submission of Proposal (Annex 2) <input checked="" type="checkbox"/> General Terms and Conditions / Special Conditions (Annex 3) ⁶ <input checked="" type="checkbox"/> Detailed TOR <input type="checkbox"/> Others ⁷ [pls. specify]
Contact Person for Inquiries (Written inquiries only) ⁸	<i>Procurement Unit, UNDP Armenia</i> procurement.armenia@undp.org Any delay in UNDP’s response shall be not used as a reason for extending the deadline for submission, unless UNDP determines that such an extension is necessary and communicates a new deadline to the Proposers.
Other Information [pls. specify]	

⁵ Where the information is available in the web, a URL for the information may simply be provided.

⁶ Service Providers are alerted that non-acceptance of the terms of the General Terms and Conditions (GTC) may be grounds for disqualification from this procurement process.

⁷ A more detailed Terms of Reference in addition to the contents of this RFP may be attached hereto.

⁸ This contact person and address is officially designated by UNDP. If inquiries are sent to other person/s or address/es, even if they are UNDP staff, UNDP shall have no obligation to respond nor can UNDP confirm that the query was received.

TERMS OF REFERENCE FOR PROVIDING PROFESSIONAL SERVICES

I. General Information

- Service Title:** Development of energy efficient appliances purchase promotion campaign
- Customer:** UNDP in the framework of “Regulatory Framework to Promote Energy Efficiency in Countries of the Eurasian Economic Union” regional project
- Duration:** 4 months
- Location:** Armenia

II. Background

The overarching goal of the Russian Federation-UNDP Trust Fund for Development (UNDP-RTF) Regional Project (hereafter the Project) is to reduce emissions of greenhouse gases (GHG) by promoting energy efficiency (EE) in the countries of the Eurasian Economic Union (EAEU), namely Armenia, Kyrgyzstan, Kazakhstan and Belarus, through realization of energy saving potential in lighting, household appliances and engineering equipment of buildings. To achieve the said goal, the following complex measures are implemented:

- development and introduction of modern energy efficiency standards for lighting, household appliances and engineering equipment of buildings,
- establishment of testing laboratories’ system and implementation of measures to protect the market against low efficiency equipment,
- consumers awareness raising on options and benefits of energy efficient technologies, estimation of reduction of GHG emissions.

The project will focus largely on capacity development and assisting governments, standardization institutions, manufacturing, distributing, retail, consumer and environmental stakeholders in the EEU region to implement the most cost-effective energy efficiency measures available. The project covers country components for Armenia and Kyrgyzstan, as well as the regional component for all four participating countries.

For more information, please visit the project [webpage](#).

Within the Project’s national component for Armenia, the communication strategy outlining the main directions for engaging Project’s stakeholders and promoting the key Project-related communication and awareness-raising messages has been developed. One of the core interventions envisaged by the Strategy is setting awareness-raising mechanisms to guide the customers towards more energy efficient purchase decisions. Thus, the expertise of a specialized company to develop energy efficient appliances purchase promotion campaign at energy appliances salespoints is required.

III. Scope of professional services

Objective of the Task

The task objective is to develop the roadmap of energy efficient appliances purchase promotion campaign.

Activities to Perform

Within the task implementation, the services will be provided in the following phases:

Phase 1: A study to find out the level of awareness of the customers and the capacities and willingness of the retailers to guide the customers towards energy efficient purchases.

- 1.1. Development of detailed methodology for identification and selection of potential project partner retailers, criteria determining interview sample, and development of questionnaires for:
 - Face-to-face interviews with sales assistants aimed at revealing the level of awareness of the customers about energy efficiency of the energy appliances and at evaluating the level of knowledge of the sales assistants about energy efficiency of the appliances in the stores; At least 150 completed interviews. The length of the interview (LOI) is expected to be around 45 minutes.
 - In-depth interviews with retailers' management personnel aimed at revealing the willingness of the retailers to cooperate in relation to trainings of their staff to provide comprehensive information about energy efficiency classifications and benefits to the customers and guiding them towards energy efficient purchases; at least 20 In-depth interviews.
 - Survey with customers aimed at revealing their awareness about the energy performance characteristics indicated on energy labels or in technical specifications of the equipment available in salespoints as well as of benefits of energy efficient appliances, and their incentives to make energy efficient purchases. At least 1000 completed interviews. The LOI expected around 15-20 minutes.
- 1.2. Provide the list of retailers willing to cooperate with the Project in promoting energy efficient purchases. The willingness should to be presented in the writing form agreed by the Project management.
- 1.3. Finalize methodology, guides for the In-depth interviews, timeline and questionnaires of the interviews and customer surveys (the questionnaire to be filled out in the stores) considering the number of identified retailers per Yerevan city administrative districts and large cities in Armenia; discuss and reach consent on them with the Project.

The questionnaire and Information note for customers must ensure reference to the objective of the study as an initiative of UNDP
- 1.4. Instruct interviewers on the objective and specifics of the survey. The instructions guidance process have to involve UNDP Project management and experts. Run the pre-test of the developed questionnaires (a least 15 interviews) and make necessary changes.
- 1.5. Conduct the interviews, perform the relevant comparisons and analyses, classify

indicators, and compare the findings with those of earlier conducted surveys to reveal trends of energy efficiency awareness.

1.6. Ensure the quality control for the conducted interviews at least 25% to 30%.

1.7. Presentation of findings/conclusions and recommendations based on the study results.

Phase 2: Development of a strategy for promotion and advocacy campaign of energy efficient purchases.

2.1 Based on the outcomes of the study, develop scenarios (menu of options) of activities for the energy efficient purchases promotional campaign. At least 3 scenarios for energy efficient purchases promotional campaign shall be developed.

The options shall include the rationale of proposed activities, timeframes, the tentative budget estimates as well as expected outcomes of the activities.

2.2 Discuss the proposed scenarios/options with the Project and select the most feasible scenario considering the budget, timeframe and matching with the Project’s communication strategy.

2.3 Provide detailed description of the selected scenario, including detailed program of activities, design concept of the promotional materials and handouts, resource allocation and budget.

2.4 Organize and run at least 4 Focus Groups with the identified target groups to identify the effective options for materials design, way of informing and interaction with the target groups. Prepare the transcripts of the FG and develop the recommendations based of the insights received during the Focus Groups.

2.5 Arrange the agreement on implementation of the selected activities with the respective retailers. The arrangements shall be made with at least two retailers having dominant positions in the market.

Duration of Professional Services

Estimated duration of development of the activities to be performed in the frames of the task is 4 months.

IV. Expected deliverables

#	Deliverable	Time-frame	Percentage
1	The customers’ awareness and retailers’ capacities/willingness survey methodology, including interview sampling method timeline and questionnaires for the interviews is elaborated and agreed with the Project.	1 month	30%
2	The survey is conducted, electronic database of the interviews and survey is compiled and submitted, and the report summarizing the key findings of the survey is drafted.	2 months	30%

3	The energy efficient purchases promotional campaign scenarios are developed, the most feasible scenario is selected. The detailed program to implement energy efficient purchases promotion campaign is elaborated and agreed with the Project and the selected retailers.	1 month	40%
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V. Professional Requirements

Applicant organization/company must possess:

- Experience in performing of social surveys, preferably in energy saving, energy efficiency topics;
- Experience in elaboration and implementation of customers' choice guiding programs preferably in household appliances energy performance topics;
- Detailed methodology of customers' awareness and retailers capacities/willingness to guide the customers towards energy efficient purchases, including sampling methods and questionnaires;
- Prove the ability of working with the local retailers;
- Experienced professional staff, including:
 - ✓ Task Leader with at least 10 years of general professional experience, including 3 years in developing and implementing customer's choice guiding campaigns;
 - ✓ Social survey expert with at least 7 years of experience in conducting and analyzing the results of social surveys;
 - ✓ The team of interviewers, with professional background experience of participation in at least 3 similar surveys;
 - ✓ Public Outreach specialists with at least 7 years of general professional experience, including implementation of at least 2 public outreach campaigns in energy saving/energy efficiency sectors;
 - ✓ Graphic designer with respective portfolio;
- Working experience with the UNDP-GEF is an asset.

FORM FOR SUBMITTING SERVICE PROVIDER'S PROPOSAL⁹

(This Form must be submitted only using the Service Provider's Official Letterhead/Stationery¹⁰)

[insert: Location].

[insert: Date]

To: [insert: Name and Address of UNDP focal point]

Dear Sir/Madam:

We, the undersigned, hereby offer to render the following services to UNDP in conformity with the requirements defined in the RFP dated [specify date] , and all of its attachments, as well as the provisions of the UNDP General Contract Terms and Conditions:

A. Qualifications of the Service Provider

The Service Provider must describe and explain how and why they are the best entity that can deliver the requirements of UNDP by indicating the following :

- a) *Profile – describing the nature of business, field of expertise, licenses, certifications, accreditations;*
- b) *Business Licenses – Registration Papers, Tax Payment Certification, etc.*
- c) *Latest Audited Financial Statement – income statement and balance sheet to indicate Its financial stability, liquidity, credit standing, and market reputation, etc.;*
- d) *Track Record – list of clients for similar services as those required by UNDP, indicating description of contract scope, contract duration, contract value, contact references;*
- e) *Certificates and Accreditation – including Quality Certificates, Patent Registrations, Environmental Sustainability Certificates, licenses, etc.*
- f) *Written Self-Declaration that the company is not in the UN Security Council 1267/1989 List, UN Procurement Division List or Other UN Ineligibility List.*

B. Proposed Methodology for the Completion of Services

The Service Provider must describe how it will address/deliver the demands of the RFP; providing a detailed description of the essential performance characteristics, reporting conditions and quality assurance mechanisms that will be put in place, while demonstrating that the proposed methodology will be appropriate to the local conditions and context of the work.

C. Qualifications of Key Personnel

⁹ This serves as a guide to the Service Provider in preparing the Proposal.

¹⁰ Official Letterhead/Stationery must indicate contact details – addresses, email, phone and fax numbers – for verification purposes

If required by the RFP, the Service Provider must provide :

- a) Names and qualifications of the key personnel that will perform the services indicating who is Team Leader, who are supporting, etc.;
- b) CVs demonstrating qualifications must be submitted if required by the RFP; and
- c) Written confirmation from each personnel that they are available for the entire duration of the contract.

D. Cost Breakdown per Deliverable*

	Deliverables <i>[list them as referred to in the RFP]</i>	Percentage of Total Price (Weight for payment)	Price (Lump Sum, All Inclusive), currency
1	The customers' awareness and retailers' capacities/willingness survey methodology, including interview sampling method timeline and questionnaires for the interviews is elaborated and agreed with the Project.	30%	
2	The survey is conducted, electronic database of the interviews and survey is compiled and submitted, and the report summarizing the key findings of the survey is drafted.	30%	
3	The energy efficient purchases promotional campaign scenarios are developed, the most feasible scenario is selected. The detailed program to implement energy efficient purchases promotion campaign is elaborated and agreed with the Project and the selected retailers.	40%	
	Total	100%	

**This shall be the basis of the payment tranches*

E. Cost Breakdown by Cost Component [This is only an Example]:

Description of Activity	Remuneration per Unit of Time	Total Period of Engagement	No. of Personnel	Total Rate
I. Personnel Services				
1. Services from Home Office				
a. Expertise 1				
b. Expertise 2				
2. Services from Field Offices				
a. Expertise 1				
b. Expertise 2				
3. Services from Overseas				
a. Expertise 1				
b. Expertise 2				
II. Out of Pocket Expenses				
1. Travel Costs				
2. Daily Allowance				
3. Communications				
4. Reproduction				
5. Equipment Lease				
6. Others				
III. Other Related Costs				

[Name and Signature of the Service Provider's Authorized Person]

[Designation]

[Date]

Annex 3

(Attached separately)

General Terms and Conditions