

## Terms of Reference (ToR) for Developing a Strategic Roadmap for creating an EESL e-marketplace

### 1. KEY DATES AND DETAILS

Event	Dates
Closing Time for submission of Proposals	08 <sup>th</sup> October 2024 at 17:30 hrs IST.
Method to submit Proposal	<p><b>Proposals must be submitted to:</b>            Ms. Aungsanant Thiptaweecharn            Program Manager            International Institute for Energy Conservation (IIEC)            1168/27 Unit B, 15th Floor, Lumpini Tower, Rama IV Road,            Thungmahamek, Sathorn, Bangkok 10120, Thailand.  <b>E-mail:</b> <a href="mailto:procurement_gef6@iiec.org">procurement_gef6@iiec.org</a></p> <p>The Bidder shall submit only an <b>electronic version</b> (in PDF format) of the proposal strictly in separate attachments as mentioned below-</p> <p><b>File 1: Technical Proposal (not more than 25 pages)</b>            including expertise of firm/organization, approach, methodology, implementation/work plan and team members' CV. The CV of each team member should not exceed 3 pages. However, CVs do not count as a part of 25 pages limit.</p> <p><b>File 2: Financial Proposal (not more than 2 pages)</b></p> <p><b>File 3: Copy of Work Orders showcasing relevant experience (not more than 15 pages)</b></p> <p><b>File 4: Letter of Association (In case of JV), Certificate of Registration (legal status), Financial audited statement of last 3 years (In case of JV Credentials required are of Lead Bidder).</b></p> <p><i>(The proposal document should be single-spaced, 12-point Times New Roman font in Microsoft Word, at least one-inch margins)</i></p> <p>Proposals with conditional offers or variables, submitted in any manner other than as detailed in this section or submitted after the deadline, shall be deemed invalid and may be excluded from consideration.</p>
Expected execution date of Contract	15 <sup>th</sup> October 2024

## 2. BACKGROUND

According to the Bureau of Energy Efficiency (BEE), India's energy efficiency market is estimated to be worth INR 150,000 Crores<sup>1</sup>. Both government policies and efforts by multilateral and bilateral organizations to conserve energy across a wide range of sectors have supported the emergence of various innovative programs for the implementation of energy efficiency and demand-side management in India. In 2009, India has also seen the emergence of Energy Efficiency Services Limited (EESL), a Super ESCO. EESL is a Joint Venture of Power Grid Corporation of India Limited (PGCIL), NTPC Limited (NTPC), Power Finance Corporation Limited (PFC) and Rural Electrification Corporation Limited (REC) to facilitate the implementation of energy efficiency projects. EESL is also leading the market-related actions of the NMEEE. To learn more about EESL, visit [www.eeslindia.org](http://www.eeslindia.org)

Under the GEF-6 Cycle, the Global Environment Facility (GEF) is supporting Energy Efficiency Services Limited (EESL), for the execution of “Creating and Sustaining Markets for Energy Efficiency” Project. UNEP is the implementing agency for this project and EESL is the ‘executing agency’. The objective of this GEF project is to reduce greenhouse gas (GHG) emissions through energy efficiency through scaling up and new technology applications. Since the start of 2024, the International Institute for Energy Conservation (IIEC) has been assisting EESL as a technical executing agency in the execution of the tasks under the GEF-6 project.

## 3. ABOUT INTERNATIONAL INSTITUTE FOR ENERGY CONSERVATION (IIEC)

The International Institute for Energy Conservation (IIEC) was established in the USA in 1984 as a non-governmental, not-for-profit organization and has regional offices in India, the Philippines and Thailand. IIEC's mission is to accelerate the global adoption of energy efficiency and renewable energy policies, technologies, and practices to enable economic and environmentally sustainable development. IIEC pursues this mission in developing countries and countries in transition through fieldwork undertaken by its regional offices. For the last four decades, IIEC has been providing solutions to the problems posed by the rapidly increasing energy demand in developing and industrializing countries. IIEC works with governments and the private sector to develop, implement, and evaluate energy efficiency and renewable energy policies, programs, and projects.

## 4. PROJECT OBJECTIVE

The EESL e-marketplace initiative aims to address the growing demand for sustainable solutions by creating a centralized platform for energy-efficient Projects and products. This e-marketplace will be the first of its kind in India, run by a public entity, and will cater to a one-stop solution for users such as industries, small and large businesses, ESCOs, and retail consumers. The platform aims to promote energy-efficient products or technologies, enabling reduced energy consumption, and contributing to India's energy security goals. The platform will offer features such as product and projects, technology awareness, validation & certification of products & technologies, customized solutions, and educational resources.

This e-marketplace will enable accelerated adoption of energy-efficient technologies to foster innovation, transform markets for energy efficiency, and create new business opportunities.

<sup>1</sup>ESCOs | BUREAU OF ENERGY EFFICIENCY, Government of India, Ministry of Power ([beeindia.gov.in](http://beeindia.gov.in))

The overall objective will cover but not limited to:

- Provide a comprehensive strategic roadmap for EESL to develop an e-marketplace covering various EE appliances, equipment and projects that end users and other stakeholders could procure.
- Further, to create a revenue model for EESL including the revenue streams from projects, products, certifications services and advertisements.

#### Objectives with Tangible Outputs

With this background, IIEC is seeking to engage a consultant/ agency to develop a strategy for EESL dedicated to promoting energy-efficient products and services through the e-marketplace.

The strategy shall be made in close collaboration with IIEC & EESL.

## 5. SCOPE OF WORK

### 1. Roadmap and Framework for Marketplace:

- **Execution Strategy:** Develop an implementation strategy for the EESL platform that facilitates the procurement of energy efficient products, projects and customized technologies with transparency for both B2B (MSMEs, vendors) and B2C users.
- **Platform Architecture:** Design a seamless marketplace architecture to accommodate B2B & B2C users for energy efficiency products and projects, ensuring ease of use and intuitive navigation flow.
- **Master Portal Integration Structure:** Structuring a Master Portal for integration with stakeholders. The portal will handle user data management, dashboard controls, reporting, LOA (Letters of Award) issuance, and compliance checkpoints. Managing users, vendors, agreements, revenue and reporting all at one place.
- **Agreements Portal:** Framework of an Agreements Portal that enables standardized agreements between EESL, vendors, and MSMEs, with options for customization and document storage. It should include real-time compliance checks and legal approvals.
- **Marketplace Portal:** Strategy and Roadmap of a Marketplace Portal that serves as a discovery hub for energy-efficient products and services. The portal should include product details, pricing transparency, and certification information.
- **Vendor Portal:** Framework of a Vendors Portal to allow vendors to onboard easily, list their products, manage orders, track inventory, and process invoicing. Vendors will have real-time data access on sales and stock levels.
- **Custom Procurement Process:** Create a step-by-step guide for procurement of customized technologies / custom order for MSMEs and industries to procure customized solutions efficiently.
- **End to End product Architecture Guide:** From order placement to tracking and fulfilment, the complete process flow of the marketplace.

## 2. Features, Workflows, and Solution Architectures:

- **Platform Navigation Flow & Architecture:** Flow ensuring easy navigation for both product and project discovery. Suggesting Intuitive features and search filters for categories, product specifications, comparison analysis and ensuring a seamless user journey.
- **Detailed Process Diagrams:** Develop comprehensive process diagrams outlining each step of product procurement, project bidding, vendor onboarding, and payment reconciliation.
- **Customized Project Bidding:** Build a dynamic bidding process where vendors can submit competitive bids for large energy efficiency projects, allowing users to compare offers easily.
- **Sustainability Impact Calculator:** Guide to integrate a Sustainability Impact Calculator algorithm to measure energy savings, carbon emission reductions, and other environmental benefits. Display real-time data to users for informed decision-making.
- **Real-Time Project & Product Tracking:** Guide to implement real-time tracking tools for both products and projects, allowing users and vendors to monitor the status of orders and project milestones.
- **Automated Notifications & Alerts:** Set up automated notifications for project updates, order confirmations, shipment tracking, and payment milestones to keep all parties informed.
- **Solution Architecture Blueprints:** Provide solution architecture blueprints for the entire marketplace platform, including integration points with third-party services (e.g., payment gateways, logistics, AI tools and ERP systems).

## 3. Revenue Generation Models:

- **Marketplace Commission Structure Modelling:** Define a detailed referral structure where EESL charges vendors a commission per transaction for both products and services sold.
- **Referral and Listing Fees Model:** Create a referral fee model where EESL charges vendors for leads and listings on the platform. Vendors pay a fee to have their products featured.
- **Validation and Certification Fees Structure:** Structure a revenue stream for certification services, allowing vendors to get their products validated through EESL's empanelled agencies, which will include fees for energy efficiency validation.
- **Advertising Revenue Framework:** For Generate revenue from vendors through advertising slots, sponsored content, featured listings, and banner ads on high-traffic areas of the platform (e.g., homepage, search results).
- **Subscription-Based Services:** Introduce monthly/annual subscription packages for vendors and MSMEs to access premium services like advanced reporting, analytics, and project tracking tools.
- **Project Facilitation Fees:** Charge service fees for facilitating large-scale energy efficiency projects, including end-to-end project management support and consultation services for vendors and users.

## 4. Data Management, Guidelines, Access, Reports, and Integration Points:

- **Centralized Data Repository:** Guide to develop a centralized system to manage vendor and user data securely, including personal preferences, transaction history, and feedback loops.
- **Data Governance Protocols:** Establish strict data governance protocols to maintain data quality and ensure compliance with privacy laws (GDPR, etc.) and cybersecurity standards.

- **Real-Time Data Syncing:** Implementation strategy for real-time data syncing between the platform and external systems, including stock levels, user interactions, and order status, to provide transparency.
- **Reporting & Analytics:** Integration guide for reporting of tools that offer insights into marketplace performance, vendor compliance, and project metrics. Vendors and users should be able to generate custom reports.
- **Suggestion Docs API Integration with External Systems:** Ensure integration with third-party systems such as SAP, Oracle, and other ERP solutions for seamless procurement, invoicing, and data exchange.
- **User Data Access Controls Guides:** Introduce strict access controls for user and vendor data, ensuring role-based permissions to protect sensitive information.
- **Mechanism for Audit Trails and Monitoring:** Set up detailed audit trails for every transaction, ensuring compliance and traceability. Use monitoring tools to detect and prevent unauthorized activities on the platform.

## 5. Training Capability and Content Awareness:

- **Knowledge Hub:** Design a comprehensive knowledge repository having up-to-date resources like blogs, webinars, tutorials, and case studies on energy-efficient technologies and sustainability.
- **Awareness Campaigns:** Strategy to execute awareness campaigns to promote the marketplace's value, with a focus on MSMEs and industries seeking energy-efficient solutions.
- **User Onboarding and Training:** Develop detailed training program docs for new vendors and users, offering guidance on product listings, compliance, and platform best practices.
- **Energy Efficiency Certifications:** Provide detailed documentation and training materials to help vendors and MSMEs get certified for energy efficiency compliance.
- **Training for Marketplace Features:** Doc for training for vendors on how to use advanced features, including bidding, inventory management, and reporting tools.
- **Module for Hosting Sustainability Workshops:** Host sustainability workshops and forums to educate users on the importance of energy-efficient technologies and how they can positively impact environmental goals.
- **Content Marketing Strategy:** Design a content marketing strategy focusing on the success stories of energy-efficient projects and new product launches to drive user engagement.

## 6. Facilitating Vendor Agreement & SLA Setup:

- **Standardized Agreement Templates:** Develop and provide standardized agreement templates for vendors and MSMEs, covering all legal, financial, and operational aspects.
- **Service Level Agreements (SLAs):** Define SLAs with clear timelines and penalties for non-compliance, ensuring vendor accountability in areas such as stock management and order fulfillment.
- **Automated Compliance Checks:** Guide to automate the compliance verification process for vendors, ensuring they meet all legal and statutory requirements before onboarding.
- **Vendor Invoicing and Reconciliation:** Set up an automated invoicing and payment reconciliation process for vendors, process ensuring that payments are made on time to the vendors and discrepancies are flagged.

- **Penalty and Dispute Resolution Mechanisms:** Establish clear penalties for SLA breaches and an efficient dispute resolution mechanism to resolve conflicts between vendors and customers.
- **Vendor Performance Tracking:** Implement tools to track vendor performance based on customer reviews, order fulfillment accuracy, and compliance with SLAs.
- **Legal Compliance for Vendor Agreements:** Ensure legal review and regulatory compliance of all agreements before execution, minimizing risks for both EESL and vendors.

## 7. Compliance Check, Policies:

- **Legal Compliance Documentation:** Require vendors to submit business licenses, energy efficiency certifications, tax documents, and other legal credentials during onboarding.
- **Energy Efficiency Certification Process:** Provide a step-by-step guide to vendors on how to get their products certified by EESL's empanelled agencies for energy efficiency.
- **Standard Operating Procedures (SOPs):** Draft detailed SOPs for the entire vendor onboarding process, including document submissions, compliance checks, and platform usage guidelines.
- **Audit Trail and Regulatory Monitoring:** Strategy to implement an audit trail system that tracks every step in the compliance process, ensuring vendors adhere to both local and international regulatory requirements.
- **Ongoing Compliance Reviews:** Policy to schedule regular compliance reviews for all vendors, ensuring continuous adherence to legal, tax, and environmental guidelines.

## 6. DELIVERABLES

The selected organization/agency will be responsible for producing or carrying out the following:

1. Comprehensive stakeholder analysis report.
2. Strategy document for the entire EESL e-Marketplace including EE Project Portal, Product Portal, Certification & Validation Portal, Advertisement Portal Portfolios
  - Detailed competitive analysis and feature prioritization document.
  - Vendor onboarding strategy, guidelines.
  - SOPs reports for EE Projects Portal.
  - Framework for customized solutions and lead distribution.
  - Plan for educational and awareness initiatives.
  - Model for certification and validation of the projects and technologies
  - Business Plan & Revenue Projections
3. Support and Development of EE Project Portal
  - Provide User Flows, Concepts and Working of the entire EE Project portal
  - UX/UI Inputs
  - Testing Inputs
  - Product Roadmap Inputs to the IT Team
4. Final strategy report with actionable recommendations.

## 7. SUBMITTAL & REPORTING

Interested organizations/ agencies must provide information indicating that it is qualified to perform the services, along with budgetary quotes, by submitting the proposal as described above via email to [procurement\\_gef6@iiec.org](mailto:procurement_gef6@iiec.org) with the subject as '**Proposal for Developing a Strategic Roadmap for creating an EESL e-marketplace**' in the subject line by **08<sup>th</sup> October 2024 at 17:30 hrs IST.**

- Proposals should include the following information.
- Brief background about your organization
- Organisational & team's relevant experience
- A narrative outlining the vision for the work along with the suggested methodology, work plan, and/or other technical inputs for the assignment.
- Team composition and individual qualifications & experience.
- References of similar projects or assignments with contact details (email and telephone)
- Budget information.
- The bidder should submit a detailed cost proposal in USD only.

## 8. TIMELINES

The shortlisted consultant/ agency must complete the project in 3 months.

## 9. SCHEDULE OF PAYMENTS

- i. Kick-off Meeting and Inception Report **(25%)**
- ii. Draft Strategy Report **(25%)**
- iii. On Approval of the Final Strategy Report including Strategic Framework Development & Roadmap Development **(50%)**

## 10. EVALUATION CRITERIA

The bids shall be evaluated based on the Quality cum Cost Based Selection **with 75% (Seventy-Five percent) weightage to technical score and 25% (Twenty-five percent) weightage to financial bid.** The following are the qualification criteria for the selection of an organization/agency.

- **Pre-screening:** All applications meeting the minimum eligibility criteria and conformance to the application content requirements will be evaluated by the Evaluation Committee (EC).
- **Final Evaluation:** The proposals will be evaluated based on the marks obtained as per the criteria provided below against each category by the EC.

Parameters	Marks	Maximum Marks
1. Quality of Technical Proposal <b>Sub-Criteria:</b> a) Adequacy of the proposed methodology in responding to the Terms of Reference b) Technical approach and work plan c) Specific experience of the proposed team members	25  20 20	<b>65</b>
2. Specific experience of the Organization/Agency relevant to the assignment	10	<b>10</b>
3. Bid cost competitiveness	25	<b>25</b>
<b>TOTAL</b>		<b>100</b>

## 11. QUALIFYING REQUIREMENTS

- Have a legal status in India enabling the firm to carry out the assignment.
- Average annual turnover for the last three financial years should be at least INR 1 Crore. In the case of JV, the Lead partner must meet the ATO criteria.
- The organization/ agency must have a minimum of Three (3) years' experience in the field of e-marketplace, strategy development and marketing. Preference shall be given for prior projects in the field of consumer electrical or electronics.
- Experience in successfully carrying out at least 2 e-marketplace strategy development and marketing projects.
- A team comprising of:
  - **Team Leader** – With a minimum experience of 07 years and expertise in development of e-marketplace strategy, e-marketplace operations, project management etc.
  - **Technical Experts (2 Nos.)** – With a minimum experience of at least 03 years in the field of development of e-marketplace strategy, e-marketplace operations, Consumer appliances, B2B, B2C, D2C Consultancy, etc.
  - **Additional Team members related to Legal and Commercial aspects.**

**Note:** Bidders shall submit the relevant supporting documents showcasing their qualifications and experience relevant to the qualifying criteria mentioned above. However, IIEC holds the right to seek any additional documents during the evaluation process as deemed necessary.

## 12. INSTRUCTIONS FOR BIDDERS

- Bidders are requested to submit the complete proposal as mentioned on Page 1 of this RFP document.
- Files/ Folders greater than 20 MB in size will not be delivered on the above-mentioned email ID resulting in non-submission of the bids.

- Submission of bids through any open source or links to shared drives such as Google Drive, OneDrive, WeTransfer, Dropbox etc. shall not be entertained and will stand disqualified.
- Project references and the associated documentary evidence should be easily identifiable for ease of evaluation.
- Submission of Financials should indicate the component of local taxes, as applicable.

### 13. TERMS AND CONDITIONS

- The maximum cumulative liability of the Consultant/ agency entering a contract with the Client shall be limited to the Contract Value.
- IIEC is under no obligation to accept any proposal or part thereof, that is received in response to this project.
- IIEC reserves the right to seek clarification or request for any additional documents as deemed necessary. Furthermore, the IIEC reserves the right to modify or cancel the RFP (including extending the deadline for the receipt of proposals) without justification or compensation payable to the bidder.
- IIEC will not reimburse bidders' expenses, including those related to responding to this RFP. In case of any additional tasks are required, the consultant should seek prior approval in writing from IIEC.
- Confidentiality: All data and information received from IIEC and partner organizations, provided to the agency for this assignment is to be treated confidentially and are only to be used in connection with the execution of these Terms of Reference (a specific separate confidentiality agreement may be agreed between the Consultancy and IIEC, if needed to provide information more freely). All intellectual property rights arising from the execution of these Terms of Reference are assigned to IIEC. The contents of written materials obtained and used in this assignment may not be disclosed to any third parties without the expressed advance written authorization of IIEC and its partner organizations.