

Terms of reference (ToRs)

Develop, implement and maintain a Portal for implementing the phase-II **Project number/**
of MNRE RTPV scheme and West Bengal Government Schemes **for cost centre:**
RTPV installations in the domestic/residential category 12.9210.1

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1. Context

The target of the National Solar Mission is an installed capacity of 40,000 MW of rooftop solar photovoltaic by 2022. The official statistics of the MNRE show that the currently installed capacity is around 2,800 MW. The State Governments and the respective electricity regulatory commissions have announced suitable policy and regulatory framework for promotion of rooftop solar photovoltaic systems. Despite all that the growth in the solar rooftop sector has been sluggish. To provide impetus to the RTPV sector development, MNRE and some States have recently announced new subsidy schemes.

MNRE has recently announced the Phase-II of the grid connected solar rooftop PV scheme where the subsidy is available only for the domestic category consumers and the beneficiaries will be given subsidy of 40% up to 3KW and subsidy of 20% for system of 3 to 10 KW. The guidelines for implementation of the scheme are under preparation and will be announced very soon. This new scheme shall be implemented through the State power distribution companies and the State Discoms will be the nodal agencies.

A critical step in the installing a grid connected plant is the grid connection to the distribution network. In order to implement the provisions in the regulations for promotion of rooftop solar / renewable power plants, several distribution licensees have laid down the procedures for interconnection. These procedures consist of many steps which involve a transaction (money as well as documentation) between the consumer and the licensee and approval / feasibility steps within the hierarchy of the licensee. In order to make the process of interconnection more efficient and effective, several measures are required to be taken. Along with capacity building of the field level staff of the licensee, it is also important to support the entire process through information and technology.

German Development Cooperation (GIZ) in partnership with Ministry of New and Renewable Energy (MNRE) is implementing Indo-German Solar partnership project (IGSP). Under IGSP, the key objective is to support the installation of the solar rooftop PV systems across the States allocated to GIZ by MNRE. Under this ToR GIZ aims to develop, implement and maintain a Portal for implementation of the schemes announced by MNRE and the Government of West Bengal.

2. Tasks to be performed by the contractor

The objective of this assignment is to develop a Portal and for processing the solar rooftop applications and to establish a conducive ecosystem and streamline the entire solar rooftop programme for the State of West Bengal. The Portal shall be used for approvals, tracking, commissioning and payment of subsidy for solar PV projects in the state. The platform shall be useful for the monitoring purpose right from approval for connectivity and subsidy disbursement from Department of Power, West Bengal and MNRE. The Consultant is responsible for providing the following services:

Task 1: Review of the existing procedure

- a. Review the existing procedure for interconnection with the distribution network and provide standardized procedure to make it more efficient and effective yet meeting all requirements under the existing legal and regulatory framework.

- b. Development of detailed subsidy procedure for Department of Power, West Bengal and MNRE along with standard forms & formats upon understanding gaps/variations from existing forms/formats and procedures.
- c. Devising strategy and process for transition of existing process, online application registry and migration of the same to the Portal.
- d. Development of detailed BRD document covering both interaction and information functionalities upon addressing above State specific customization requirements
- e. The consultant shall take final approval on the standardized procedure from all the Discoms in West Bengal and then the Portal shall be developed as per the guidelines/procedures approved by DEPARTMENT OF POWER, WEST BENGAL and MNRE
- f. The consultant shall submit a detailed process mapping report.

Task 2: Development, testing and hosting of the Portal

- a. The tool shall be in-line with the approved procedures by Department of Power, West Bengal and shall also meet the requirements as per the MNRE guidelines.
- b. The Consultant shall develop an online Portal which shall connect 1) End Customer/Roof Owners through App/ Website; 2) Government Agencies like Discoms, Department of Power, West Bengal and CEI; 3) Installer's interface with consumer and Government agencies.
- c. The Portal shall have features for online submission of application, approvals, tracking, commissioning, payment receipt and providing all the requisite data for disbursement of subsidy, feature of online and offline payments (the "Software").
- d. The Portal shall also have the feature to fetch the consumer data from the Discoms database.
- e. The Portal shall have the facility of email and SMS gateway for communicating with various agencies and consumers.
- f. The Portal shall map all the offices of the Discom, subject to the requisite information of the hierarchy provided by the respective Discoms.
- g. The Portal shall have separate login for consumers and officers of the appropriate agency with user-friendly interfaces and necessary security features.
- h. The consultant shall facilitate all necessary security procedures for the Portal.
- i. The Portal shall also be linked with MNRE's SPIN portal.
- j. The consultant shall also be responsible for hosting the Portal for a period of 4 months after the development of the Portal.
- k. Testing of Beta Version of Portal in order to check all interactive and information functionalities
- l. Demonstration of key functionalities to the stakeholders such as Discoms, Department of Power, West Bengal and get their signoff for initiating security audit
- m. Support in addressing vulnerabilities found during security audit process
- n. Support in finalization of Webhosting Requirements
- o. The consultant shall be available for meetings with Department of Power, West Bengal.
- p. The Portal to be developed for the new scheme shall be integrated with the existing unified portal in the State and both the tools shall be operated under one URL.
- q. The Consultant shall also develop basic reports for tracking the process of the projects status

- r. The Consultant shall develop a system for Subsidy Management where the following things shall be developed
 - a) Receipt of Subsidy Claim from Installer
 - b) Verification and Approval from Discom side
 - c) Payment details of subsidy made for each claim
- s. Developing the complaint grievance system
- t. Providing a solar calculator to estimate the approximate capacity of solar PV system.
- u. PV module Inspection tool having the following broad functionality:
 - a) Installer: Provision to raise the request for PV module Inspection
 - b) Inspector: Provision to capture the details at site or backend office and approve
 - c) Mapping of inspected PV modules with the Installer login for entering the PV modules details
- v. Discom: Provision to assign the Inspection of DCR PV modules to the Inspectors

Task 3: Capacity building workshops

- a. Physical workshop / trainings are required to be conducted for the officers of Department of Power, West Bengal and empanelled vendors and distribution licensees to perform their assigned role in the entire procedure for interconnection including feasibility, inspection, monitoring, metering and subsidy disbursement etc. The workshops / trainings shall be designed in a way to clear all their doubts and concerns to the best possible level. The concept of each workshop shall be approved by GIZ. Each session may be of 1- 2 days.
- b. The consultant shall conduct minimum 5 (five) workshops.
- c. The consultant shall also develop multimedia tutorials / videos for training the staff of the distribution licensee/APEDA.
- d. The consultant shall also facilitate smooth handover of the Portal to Department of Power, West Bengal/respective agency and support in smooth operation of the Portal for at least one month after the handover of the Portal.

Certain milestones, as laid out in the table below, are to be achieved by certain dates during the contract term, and at locations identified by Discoms:

Deliverables	Deadline/place/person responsible
Submission of overall concept / kick-off meeting	1 weeks
Standardized procedure is approved by Discoms and DEPARTMENT OF POWER, WEST BENGAL	3 weeks
Beta version of the Portal	8 weeks
Final Portal is accepted by DEPARTMENT OF POWER, WEST BENGAL and all the Discoms in the State of West Bengal	12 weeks
5 Workshop/Trainings are conducted for the officers of DEPARTMENT OF POWER, WEST BENGAL and all the Discoms	20 weeks

Period of assignment: From September 2020 until August 2021.

3. Concept

In the bid, the bidder is required to show how the objectives defined in Chapter 2 are to be achieved, if applicable under consideration of further specific method-related requirements (technical-methodological concept). In addition, the bidder must describe the project management system for service provision.

Technical-methodological concept

Strategy: The bidder is required to consider the tasks to be performed with reference to the objectives of the services put out to tender (see Chapter 1). Following this, the bidder presents and justifies the strategy with which it intends to provide the services for which it is responsible (see Chapter 2).

The bidder is required to present the actors relevant for the services for which it is responsible and describe the **cooperation** with them.

The bidder is required to present and explain its approach to **steering** the measures with the project partners and its contribution to the results-based monitoring system.

The bidder is required to describe the key **processes** for the services for which it is responsible and create a schedule that describes how the services according to Chapter 2 are to be provided. In particular, the bidder is required to describe the necessary work steps and, if applicable, take account of the milestones and contributions of other actors in accordance with Chapter 2.

The bidder is required to describe its contribution to knowledge management for the partner and GIZ and promote scaling-up effects (**learning and innovation**).

Other specific requirements

The consultant shall strive for gender equality in their proposed staff in the technical proposal.

Project management of the contractor

The bidder is required to explain its approach for coordination with the GIZ project.

- The contractor is responsible for selecting, preparing, training and steering the experts (national, short and long term) assigned to perform the advisory tasks.
- The contractor makes available equipment and supplies (consumables) and assumes the associated operating and administrative costs.
- The contractor manages costs and expenditures, accounting processes and invoicing in line with the requirements of GIZ.

The contractor reports regularly to GIZ in accordance with the AVB of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH from 2018

In derogation from GIZ AVB, the contractor makes contributions to reports to GIZ's commissioning party instead of submitting its own reports.

In addition to the reports required by GIZ in accordance with AVB, the contractor submits the following reports:

- Inception report

- Contributions to reports to GIZ's commissioning party
- Brief quarterly or half-yearly reports on the implementation status of the project (5-7 pages)

The bidder is required to draw up a **personnel assignment plan** with explanatory notes that lists all the experts proposed in the bid; the plan includes information on assignment dates (duration and expert days) and locations of the individual members of the team complete with the allocation of work steps as set out in the schedule.

4. Company Profile

To be eligible to participate in this tender, the consulting firm must have minimum 2 years of experience in the field of renewable energy consulting, regulatory and policy consulting in India, IT product development for renewable energy and solar energy sector consulting. The consultant shall meet the following minimum requirements and submit documentary evidence, the reference projects shall have value more than EUR 20000.

- i. Consulting firm must have developed minimum 2 web portals for renewable energy in last 3 years
- ii. Consulting firm must have executed minimum 3 projects in the field of renewable energy in last 3 years
- iii. Average annual turnover of the firm for the last 3 years shall be at least EUR 90000

Number of employees as on 31.12.2019 shall be at least 10 persons.

Consortium guidelines –

- Consortium with other firms is allowed. All the partners must be onboard at the time of bidding.
- The lead partner must be legally registered entity in India. The contract will be issued in favour of Lead Partner and in INR only.
- The bidder can hire the services of freelance consultants.
- Subcontracting the said assignment to different agency/outsourced agency is not allowed
- In case of entering into a consortium. The agency must submit the following documents within technical proposal.

- a. **Name of Lead Partner (first party)**
- b. **Name of the Firm with whom the consortium is formed**

5. Personnel concept

The bidder is required to provide personnel who are suited to filling the positions described, on the basis of their CVs (see Chapter 8), the range of tasks involved and the required qualifications.

The below specified qualifications represent the requirements to reach the maximum number of points.

Team leader

Tasks of the team leader

- Overall responsibility for the advisory package of the contractor
- Ensuring the coherence and complementarity of the services of the contractor with other services delivered by the programme at local and national level
- Strategy, implementation, monitoring and evaluation of capacity development measures for local partners in the following areas: Demand aggregation, policy recommendation and sustainability measures
- Consideration of cross-cutting themes (e.g. gender equality)
- Personnel management, in particular identifying the need for short-term assignments within the available budget, as well as planning and steering assignments and supporting local and international short-term experts
- Ensuring results monitoring is conducted
- Regular reporting in accordance with deadlines
- Responsibility for controlling the use of funds and financial planning in consultation with GIZ's officer responsible for the commission
- Supporting the officer responsible for the commission in updating/adapting the project strategy, in evaluations and in preparing a follow-on phase

Qualifications of the team leader

- Education/training (2.1.1): University qualification (Degree) in Engineering
- Language (2.1.2): Good business language skills in English and Hindi
- General professional experience (2.1.3): 10 years of professional experience in the Indian Energy sector in the field of renewable energy
- Specific professional experience (2.1.4): 5 years in professional/consulting experience in setting up solar rooftop plants
- Leadership/management experience (2.1.5): 6 years of management/leadership experience as project team leader or manager in a company
- Regional experience (2.1.6): NA
- Development Cooperation (DC) experience (2.1.7): 2 years of experience in DC projects

Expert 1: Project Manager

Tasks of expert 1

- Assessment of existing procedures, regulations and policies
- Responsible for supporting the Team leader in developing and executing the tasks 1 to 3

Qualifications of expert 1

- Education/training (2.2.1): University qualification (Degree) in Engineering
- Language (2.2.2): Good business language skills in English, Hindi
- General professional experience (2.2.3): 5 Years of experience in Indian Energy Sector
- Specific professional experience (2.2.4): 3 years' experience in setting up grid connected and off-grid solar rooftop plants
- Leadership/management experience (2.2.5): 5 years' experience in project management
- Regional experience (2.2.6): 5 years of experience in projects in India of which 2 years with State Governments
- Development Cooperation (DC) experience (2.2.7): 2 years' experience in working with DC

- Other (2.2.8): Shall have managed development of online Portals/portals

Soft skills of team members

In addition to their specialist qualifications, the following qualifications are required of team members:

- Team skills
- Initiative
- Communication skills
- Sociocultural competence
- Efficient, partner- and client-focused working methods
- Interdisciplinary thinking

In addition to the above 2 positions, the bidder shall submit a pool of short-term experts as follows:

Short-term expert pool with minimum 2, maximum 4 members

Tasks of the short-term expert pool

- Development of the process map
- Developing the Portal

Qualifications of the short-term expert pool

- Education/training (2.6.1): 1 expert with university qualification (degree) in engineering, 1 expert with university qualification (degree) in IT
- Language (2.6.2): 1 expert with very good language skills in English, Bengali and Hindi, General professional experience (2.6.3): 1 expert with at least 5 years' of experience in the Renewable Energy sector, 1 experts with at least 5 years' of professional experience in the Portal development
- Specific Professional Experience (2.6.4.): NA
- Regional Experience (2.6.5): NA
- Development Cooperation (DC) experience (2.6.6): 2 experts with at least 2 years of experience in DC

The bidder must provide a clear overview of all proposed short-term experts and their individual qualifications.

Other specific requirements

In case there are requirements/request from Government for additional trainings/workshops beyond the estimated 10 workshops, the consultant shall be available for delivering the sessions and managing the workshops. The costing for the additional workshops in regard to the logistics will be borne by GIZ.

6. Costing requirements

Assignment of personnel

Team leader: On-site assignment for 60 expert days

Project Manager: On-site assignment for 60 expert days

Short-term expert pool: total 120 expert days

Travel

The bidder is required to calculate the travel by the specified experts and the experts it has proposed based on the places of performance stipulated in Chapter 2 and list the expenses separately by daily allowance, accommodation expenses, flight costs and other travel expenses.

7. Inputs of GIZ or other actors

GIZ shall help in steering the study along with the implementation partners.

8. Requirements on the format of the bid

The structure of the bid must correspond to the structure of the ToRs. In particular, the detailed structure of the concept (Chapter 3) is to be organised in accordance with the positively weighted criteria in the assessment grid (not with zero). It must be legible (font size 11 or larger) and clearly formulated. The bid is drawn up in English (language).

The core proposal/bid shall not exceed 20 pages (excluding CVs & other supporting company documents; as mentioned in grid for assessing eligibility of firms).

The CVs of the personnel proposed in accordance with Chapter 4 of the ToRs must be submitted using the format specified in the terms and conditions for application. The CVs shall not exceed 4 pages. The CVs must clearly show the position and job the proposed person held in the reference project and for how long.

If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment.

Please calculate your price bid based exactly on the aforementioned costing requirements. In the contract the contractor has no claim to fully exhaust the days/travel/workshops/ budgets. The number of days/travel/workshops and the budget amount shall be agreed in the contract as 'up to' amounts. The specifications for pricing are defined in the price schedule.

The option is exercised in the form of an extension to the contract based on the already offered individual rates.