

# **SURVEY / STUDY OF SERVICE SECTOR ENTERPRISES UNDER HCFC PHASE-OUT MANAGEMENT PLAN (HPMP) STAGE-II PROJECT**

## **Terms of Reference (TOR)**

### **1. Background**

India is a Party to the Montreal Protocol since 1992 and has been implementing phase-out of production and consumption of Ozone Depleting Substances (ODSs). The production and consumption of Chlorofluorocarbons (CFCs), Carbon tetrachloride (CTC) and Halons has been successfully phased out in India as of 1<sup>st</sup> January, 2010. The phase-out of Hydrochlorofluorocarbons (HCFCs) is ongoing as per the accelerated phase-out schedule of HCFCs under the Montreal Protocol.

The HCFC Phase-out Management Plan (HPMP) is being implemented in the country. The Executive Committee (ExCom) of the Multilateral Fund (MLF) in its 77<sup>th</sup> meeting vide decision 77/43 approved the HPMP Stage-II for India. The UNDP is the lead implementing agency for implementation of HPMP Stage-II. United Nations Environment Programme (UNEP) and Deutsche Gesellschaft für Internationale Zusammenarbeit, (GIZ) Proklima, Government of Germany are the cooperating agencies.

UNEP is the implementing agency, to implement the enabling activities under the non-investment component of India's HPMP Stage-II. Under the UNEP component, there are separate activities for strengthening of servicing sector, including survey / study of service sector enterprises/ technicians in Refrigeration and Air-conditioning (RAC) sector for creating a national database of technicians. The UNEP implements the programme through the Project Management Unit (PMU), Ozone Cell, Ministry of Environment, Forest and Climate Change (MoEF&CC).

The PMU, Ozone Cell, MoEF&CC invites proposal for carrying out the activities listed in scope of work and deliverables given in Section 3 and 4 with the objective set forth in Section 2 below for phase I of activities related to service sector under UNEP component.

## **2. Objective**

The study for the service sector enterprises / technicians in Refrigeration and Air-conditioning (RAC) sector provides information on the sector present status, future growth, linkages of RAC service technicians with franchisee/distribution network and manufacturing companies, skilling and certification needs with respect to ODS phase out, energy efficiency, safety, access to finance and social security etc. The information will assist in development of a dynamic national database for RAC service technicians allowing for information exchange.

## **3. Scope of Work**

To undertake a the study of service sector enterprises/ technicians in RAC sector involving collection, collation and analysis of information through desk study as well as field visit, as required, inter-alia covering the following in the first phase I:

- i. Status survey and nature of the sector.
- ii. Estimate on the number of technicians and future growth including self-employed technicians.
- iii. Linkages of RAC service technicians with spare part dealers, equipment distributors, OEM franchisee, third party aggregators
- iv. Skilling and certification needs especially with respect to good servicing practices and alternative refrigerants
- v. Requirement of tools and equipment
- vi. Occupational Safety
- vii. access to finance and social security schemes

## **4. Schedule**

The duration of completion of all the activities as per the scope of work is 3 months from the date of award of the assignment.

## **5. Timeline and reporting**

1. Inception report - name of state selected, action plan and methodology– Within 1<sup>st</sup> month of project inception
2. Mid-term report - submission of draft survey/ study report – End of 2<sup>nd</sup> month.
3. Final report - submission of final survey/ study report - End of 3<sup>rd</sup> month

## **6. Terms of Payment**

- a. 50% after signing the agreement.
- b. 30% after submission of mid-term report.
- c. 20% after submission of final report and acceptance by MoEF&CC.

## **7. Eligibility Criteria**

- a. Average Annual financial turnover/ grants received/research projects/income from consultancy and industry projects during the last three years, ending 31st March, 2020, should be at least INR 5 lakhs (to be supported with financial statements / audited balance sheets/sanction letter/letter of award of the last three financial years). Financial reporting for institutions created under statute and /or recognized by regulatory bodies are as per applicable rules/guidelines.
- b. Minimum 3 years' experience working in the field of Montreal Protocol and related areas such as servicing sector strategy development for ODS phase out, training of RAC service technicians, good servicing practices, energy efficiency with reference to ODS phase-out, industry sector survey, ODS phase-out projects, awareness generation and content development for ODS phase-out, monitoring and verification of ODS phase-out projects for government/ PSUs, autonomous bodies, international organizations, bilateral and multilateral bodies (to be supported by letter of award and contract).
- c. Experience of executing at least 3 assignments of order value INR 10 lakhs in the field of Montreal Protocol, international/ multilateral conventions, ecology and environment, sustainability, market survey and industry profile and related areas

for government/ PSUs, autonomous bodies, international organizations, bilateral and multilateral bodies (to be supported by Sanction letter /letter of award / contract etc.).

## **8. Submission of Proposal**

The proposal will be submitted in two parts involving Technical and Financial Proposals in two separate sealed envelopes. Proposal sent by Email/Fax will not be entertained. Last date of acceptance of the duly filled and completed bids is 14<sup>th</sup> July, 2020 by 17:30 Hours at the following address:

The Additional Director  
Ozone Cell  
Ministry of Environment, Forest and Climate Change (MoEF&CC)  
Core 4B, 2<sup>nd</sup> Floor, India Habitat Centre, Lodhi Road  
New Delhi - 110 003

### **a. Technical Proposal**

The Technical Proposal should include the following:

- i. Introduction.
- ii. Details of experience of similar work.
- iii. Approach and Methodology.
- iv. Work Plan.
- v. Details of Technical Team (include one page CV each of the persons to be associated) including qualification in relevant areas.

### **b. Financial Proposal**

The Financial Proposals should include the total lump-sum cost in INR inclusive of all taxes, travel and other expenses related to the assignment.

## 9. Evaluation and Selection

Evaluation Criteria (will be applied only to those who meet the eligibility criteria)

Criteria and their marks

Sr. No.	Criteria	Marks	
	Sub-criteria	Total criteria	Sub-criteria
1	Past Experience of the Firm	40	
	<ul style="list-style-type: none"> <li>• Number of years relevant experience               <ul style="list-style-type: none"> <li>○ 3 -6 Years</li> <li>○ More than 6 Years</li> </ul> </li> <li>• Experience of working with government/ PSUs, autonomous bodies, international organizations, bilateral and multilateral bodies               <ul style="list-style-type: none"> <li>○ 3 -6 Assignments</li> <li>○ More than 6 Assignments</li> </ul> </li> </ul>		20 10 20  20  10 20
2	Methodology, Work Plan and Understanding of TOR	20	
	<ul style="list-style-type: none"> <li>• Understanding of TOR</li> <li>• Approach and methodology</li> <li>• Work plan with timelines</li> </ul>		06 08 06
3	General profile of qualifications, experience and number of key staff	25	
	<ul style="list-style-type: none"> <li>• Qualifications</li> <li>• Relevant experience</li> </ul>		10 15
4	Overall financial strength of the firm in terms of turnover, profitability and cash flow (liquid assets) situation	15	
	Turnover figure for last three years, as applicable (Reference item 7 (a)) <ul style="list-style-type: none"> <li>• 5-10 lakhs</li> <li>• 10 - 15 lakhs</li> <li>• 15 lakhs and above</li> </ul>		5 10 15
5	Total	100	

The minimum cut off will be 75 (Seventy Five) marks for Technical proposal and competency.

### **Selection Methodology**

Quality and cost based selection

- a. Technical proposal -70%
- b. Financial proposal -30%

Financial proposals will be opened only for the technically qualified bidders and will be given cost score based on relative ranking of prices, with 100 marks for the lowest bidder and pro-rated lower marks for higher priced offers. The total score shall be obtained by weighting the quality and cost scores and the bidder that obtains the combined highest score will be considered for award.