

Terms of Reference
IDH Sustainable Trade Initiative
[ABC Facility Platform Development]

August 31, 2022

1. Introduction

IDH Sustainable Trade Initiative (“**IDH**”) accelerates and up-scales sustainable trade by building impact-oriented coalitions of front running companies, civil society, governments, knowledge institutions and other stakeholders in several commodity sectors. We convene the interests, strengths and knowledge of public and private partners in sustainability commodity programs that aim to mainstream international and domestic commodity markets. We jointly formulate strategic intervention plans with public and private partners, and we co-invest with partners in activities that generate public goods.

On basis of these Terms of Reference (“**ToR**”) IDH aims to select a party to develop a digital platform to the operationalization of the ABC Facility according to the aspects that will be explained in detail in this TOR.

2. Background

In order to support the work carried out with producers, IDH has developed a TA Facility in Brazil for low carbon agriculture projects (the so-called **ABC Facility**), whose functions, among other, are to facilitate access to credit by producers and enable carbon measuring, reporting and verification (MRV) for producers that are partners in the IDH’s field level initiatives.

The operationalization of the ABC Facility is intended to take place through a digital platform. Such platform needs to be tailor-made and reflect the specific needs of the ABC Facility. ABC Facility platform will replace the technical assistance format currently implemented, which is based on information control sprayed on Excel spreadsheets with no shared access. In addition, the ABC Facility platform shall include a credit access module and another carbon management module. Finally, the platform shall contain a tool that should be able to collect all data relating to field work and it will have to support the management of KPIs.

- 1) The basic requirements for the ABC Facility platform shall include, at minimum:
 - i. Mobile (Android and iOS) and desktop version;
 - ii. Possibility of inserting offline data for later update; and
 - iii. Open API / Plug and play.

- 2) The ABC Facility platform must contain the following functionalities for several types of users:
 - i. User type A - Field technician: must be able to create individualized profiles for rural producers, inserts data on the rural producer’s property/production,

- must be able to insert recommendation for the rural producers and should be able to fill in details of routine work, such as a basic checklist.;
- i. User type B - Rural producer: must be able to see their data entered by the technicians, as well as recommendations by the technician etc.;
 - ii. User type C - IDH: must be able to access and see all inserted content and can view aggregated data and information, so that the platform is also a tool for IDH itself to manage the information relating to programs.
- 3) The ABC Facility must provide to its users solutions to the following activities:
1. Technical assistance: all registered producers are covered by the technical assistance service, which must contain all information related to field work, The checklist will be applied initially with calf producers and in other phase it shall include other cultures, such as grains, cocoa etc.
 2. Carbon management: this is an additional module to be selected by the technician according to producer profile. IDH already has a tool for calculating the carbon footprint of properties that is applied through a form (Google Forms) and results in an Excel spreadsheet with footprint information and also the potential for carbon reduction and removal by each producer. There are two possible ways to follow: (i) adaptation of the existing tool so that it can be implemented via digital tool; or (ii) if the service provider already has a carbon management tool, IDH team will make a technical evaluation of the methodology/tool for deciding whether to use its own or the provider's.
 3. Credit access: this is an additional module to be selected by the technician according to the producer's profile. Once selected, it must collect information that will be shared with a partner company in credit analysis (already hired by IDH). It must be possible to include the information and upload specific documents for the construction of the producer's credit profile (many of them will have already been inserted in the previous modules).
 4. Monitoring: insertion, visualization and management of data that are not directly related to the interventions performed by technical assistance but are important for monitoring the activities of the program (e.g., socioeconomic profile of producers, gender, etc.)

3. Assignment

Objectives

The overall objective of this assignment is to select a service provider that will develop a digital platform for the operationalization of the ABC Facility, with the features described in the preceding section of these TOR.

Deliverables

The deliverables of this assignment will be:

Deliverables of assignment	Deadline
Prototype of the ABC Facility platform	30 th of October, 2022
Technician interface and 1 st version of the ABC Facility platform version	15 th of December, 2022
Producer interface and Final version of the ABC Facility platform	15 th of February, 2023
Monitoring and reports	31 st of May, 2023

4. Selection Procedure

The procedure will be as follows:

1. Publishing the tender and/or inviting services providers to submit a proposal based on this ToR.
2. Evaluation of the proposals by the evaluation committee. The evaluation committee will evaluate the proposals based on the selection criteria as published in this ToR.
3. Selection of highest-scoring service providers to do an intro call to present the proposal.
4. Decision on selection of the service provider.
5. Inception meeting with the selected service provider.

The schedule below indicates the timelines for the tender procedure:

Tender process	Timeline
ToR published	August/31/2022
Publication of information notice	September/09/2022
Deadline for submission of proposals*	September/23/2022
Video call with presentation of the proposals	September/30/2022
Selection of Service provider	October/07/2022
Start of assignment	October/15/2022

* Proposals submitted after the deadline will be returned and will not be considered in the tender procedure.

After the deadline to submit a proposal has passed, the evaluation committee will evaluate the proposals.

The proposals will first be tested for completeness:

- The absence of the documents referred to in Section 6 of this document can lead to exclusion from further participation in the tender procedure. This is also the case when minimum requirements listed in this ToR are not met.
- If the proposal is complete, the selection committee will evaluate the proposal based on the criterion as mentioned in section 6.

The assignment will be awarded to the service provider with the most economically advantageous tender. This is determined based on the evaluation criteria price and quality.

IDH will reject the proposal if any illegal or corrupt practices have taken place in connection with the award or the tender procedure.

5. Proposal requirements

IDH is requesting the service providers to hand in a proposal in a MS Word or PowerPoint version next to a PDF submission to facilitate any copy-and-pasting of content that we may need during evaluation.

The proposal must at least include:

Content:

- a. A succinct, well-documented approach addressing the requirements set out this ToR. We request that the proposal structure to match the selection criteria as closely as possible
- b. Maximum of three client references and a sample of previous work relevant to the deliverables in this ToR
- c. An overview of the project team, including the CVs of the project team members
- d. Budget presented in Euros (ex VAT) with a break-down of days/rate per project team member
- e. Statement on Ground for exclusion (see section 6 below)

Administrative:

- f. Completed detail request form (annex 2)
- g. Copy of most recent (audited) financial accounts
Statement of acceptance draft contract (annex 5)

The proposal must be submitted to Manuela Santos at malufsantos@idhtrade.org before **September 23rd at 23:59 CET**.

6. Testing and weighing

The assignment will be awarded to the service provider with the most economically advantageous tender. The most economically advantageous tender is determined on the basis of the evaluation criteria of price and quality.

Grounds for exclusion

1. Service providers shall be excluded from participation in this tender procedure if:
 - a) they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
 - b) they or persons having powers of representation, decision-making or control over them have been convicted of an offence concerning their professional conduct by a judgment which has the force of res judicata;
 - c) they have been guilty of grave professional misconduct proven by any means which the IDH can justify;
 - d) they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are

established, or with those of the Netherlands or those of the country where the contract is to be performed;

- e) they or persons having powers of representation, decision making or control over them have been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organization, money laundering or any other illegal activity.

Service providers must confirm in writing that they are not in one of the situations as listed above.

2. Service providers shall not make use of child labor or forced labor and/or practice discrimination and they shall respect the right to freedom of association and the right to organize and engage in collective bargaining, in accordance with the core conventions of the International Labor Organization (ILO).

Scoring and weighing

The evaluation criteria are compared and weighed according to the procedure below. This concerns a general outline of the scoring methodology and an explanation how the service provider can demonstrate compliance with the requirements.

Step 1 - Criterion Quality

Evaluation scores will be awarded for each of the components. The evaluation committee will score each component unanimously.

The proposal will be assessed based on the following selection criteria:

Component		Criteria	Max. Grading
1	Proposal overall	The extent to which the proposal meets the requirements set out in Section 3 above and throughout this document.	5
2	Design and Development process	The extent to which the Service provider demonstrates that a clear design and development process will be followed and IDH is adequately consulted for input during the design and development. The extent to which it is clear what is required of IDH in terms of human resources, digital assets and other input to deliver the project without being too onerous on our staff.	5
3	Track record	The extent to which the Service provider presents the required level of expertise and knowledge to fulfil the requirements both at team member and company level.	5

		<p>To extent to which the Service providers gives a clear description of the project team, relevant (delivering similar projects) experience of team members and time allocation per team member.</p> <p>Relevant experience in non-profit sector is advantageous.</p>	
--	--	--	--

The evaluation committee will unanimously score each component by assigning scores from 1 to 5, with the maximum grading representing optimal performance on the component and 1 representing extremely poor performance on the respective component.

Step 2 - Criterion price

A combined price in Euros (ex VAT) is to be presented. This is to be broken down by team member rate and hours.

The criterion of assessment is “the best price for the proposed level of quality” with a maximum grading of 5.

Step 3 - Weighting

The final score will be weighted 70% on Quality and 30% on Price.

If scores of service providers are equal, priority will be based on the total scores that were given for the Criterion Quality. The assignment will be awarded to the service provider that has received the highest score for the Criterion Quality and Criterion Price. If the evaluation of the Criterion Quality does not lead to a distinction, the score for the component “Proposal overall” will be decisive. If this does not lead to a distinction, the ranking will be determined by the drawing of lots.

Presentation

All applicants will be invited to present their Proposal to the evaluation committee between 16th and 24th of September 2022 as outlined in the schedule in Paragraph 4. The time reserved for each presentation will be announced by email after the suitability requirements and provided references have been checked and approved. The presentation serves for the Applicants to clarify their Proposals to IDH if the Proposal raised questions. The Presentation will not be awarded with additional scores.

The presentation, including a question round, will take a maximum of 30 minutes and include the following elements:

- brief introduction of all persons present (maximum 5 minutes);
- presentation of the Proposal (maximum 10 minutes);
- opportunity to ask questions (maximum 15 minutes).

The presentation will take place virtually and must take place in English. During the presentation, the opportunity is given to elaborate on the submitted Proposal. It is, however, not permitted to submit supplementary or new material, which is not included in the submitted Proposal during the presentation. Any deviation here from may cause the Proposal to be declared invalid.

Award

Once IDH has decided to which Service provider it intends to award the assignment, a written notification thereof is sent to all Service providers participating in the tender procedure.

7. Communication and Confidentiality

The Service provider will ensure that all its contacts with IDH, with regards to the tender, during the tender procedure take place exclusively in writing by e-mail to Manuela Santos via malufsantos@idhtrade.org. The Service provider is thus explicitly prohibited, to prevent discrimination of the other Service providers and to ensure the diligence of the procedure, to have any contact whatsoever regarding the tender with any other persons of IDH than the person stated in the first sentence of this paragraph.

The documents provided by or on behalf of IDH will be handled confidentiality. The Service provider will also impose a duty of confidentiality on any parties that it engages. Any breach of the duty of confidentiality by the Service provider or its engaged third parties will give IDH grounds for exclusion of the Service provider, without requiring any prior written or verbal warning.

All information, documents and other requested or provided data submitted by the Service providers will be handled with due care and confidentiality by IDH. The provided information will after evaluation by IDH be filed as confidential. The provided information will not be returned to the Service provider.

8. Disclaimer

IDH reserves the right to update, change, extend, postpone, withdraw, or suspend the ToR, this tender procedure, or any decision regarding the selection or contract award. IDH is not obliged in this tender procedure to make a contract award decision or to conclude a contract with a participant.

Participants in the tender procedure cannot claim compensation from IDH, any affiliated persons or entities, in any way, in case any of the afore-mentioned situations occur.

By handing in a proposal, participants accept all terms and reservations made in this ToR, and subsequent information and documentation in this tender procedure.

9. Annexes

Annex 1: Template Question Form

Annex 2: Detail request form

Annex 3: IDH General Terms and Conditions for Services

Annex 4: Statement of acceptance draft contract