Description of Service and Call for Tenders

to support household data collection in remote rural areas

1. Contractor

The Institute for Advanced Sustainability Studies (IASS) conducts research with the goal of understanding, advancing, and guiding processes of societal change towards sustainable development. In the context of the research project of IASS fellow Dr.-Ing. Natalia Realpe Carrillo, the IASS will offer financial support for household data collection studies to be implemented with rural households in Latin America, Southeast Asia, or Africa.

The data collection projects will provide the opportunity to investigate the nexus between access to energy, access to clean water, sanitation, and hygiene (WASH). Further details on the research program can be found here.

The institutions participating in these projects will receive financial support to (i) gather important insights on their clients' needs and access to basic services, (ii) use digital tools for impact monitoring and evaluation, and (iii) take part in collaborations with international research organizations.

2. The Project

The research project entitled "**Action-Based & Impact-Driven Research: Establishing Collaborative Frameworks for Researchers, Impact Makers, and Sustainable Entrepreneurs**", led by Dr. Natalia Realpe, focuses on investigating the nexus between access to energy and WASH in developing countries.

The research examines access to these basic services at the household level, as well as for productive uses.

In the framework of this research, several data collection studies related to **needs/market** assessment, access to modern **energy technologies**, and access to **water, sanitation and hygiene** will be conducted.

The project has a strong focus on the role of financial inclusion in enhancing access to basic services and aims to build on the existing relationships between microfinance institutions/cooperatives/NGOs/suppliers operating in remote rural areas and the local households.

3. The Assignment

3.1 The call

The objective of the call for tenders is to collect high-quality household data, fostering the collaboration of academic institutions and financial service providers in developing countries.

We are awarding funding to microfinance institutions/cooperatives/NGOs/suppliers that **provide field staff for the implementation of household data collection studies**.

Data collection will be carried out using digital questionnaires. Digital versions of the assessment surveys, technical support, and data collection software will be provided by HEDERA Sustainable Solutions GmbH at no cost within the scope of the project. The MFI will have access to the raw data and a dashboard for tracking the data collection and results.

3.2 Deliverables

The successful applicants will be contacted by Natalia Realpe Carrillo and will be responsible for providing a small team of enumerators to implement the digital surveys. The IASS and HEDERA Sustainable Solutions GmbH will offer free support and training on the installation and usage of the digital tools. The data collected through the project and the research results will also be made available to the institution for their internal use.

The activities to be undertaken within the scope of the contract are as follows:

1. Participate in the initial remote (online) training session
2. Implement the data collection study
3. Periodically report to IASS and Natalia Realpe Carrillo

The data collection shall be conducted in the **local language(s).**

3.3 Timeline

Applications can be submitted until February 10, 2021 at the latest. Successful applicants will be informed at the latest by March 1, 2021. The data collection projects will be implemented within 8 weeks between March and June 2021.

4. Eligibility criteria

An applicant is eligible for the assignment if they meet all of the following prerequisites:

1) Applicants shall be microfinance institutions/rural or commercial banks/NBFIs/cooperatives/NGOs/suppliers operating in Africa, Southeast Asia, or Latin America and have experience in working with at least one research institution in the last five years.
2) Institutions shall have experience in offering or have plans to offer financial products for acquiring access to basic services (e.g. energy or water loans).

3) The applicant must have a sufficient number of field staff (e.g. 3-4 officers), with a minimum experience of one year working at the institution, who are available to undertake the data collection processes in the expected timeframe.

4) The applicant is able to provide mobile Android devices to the selected loan officers for the data collection.

5) The applicant is able to conduct the data collection in the local language(s).

5. Selection criteria

The funding will be awarded in two consecutive stages.

1) **Stage One** will evaluate the most **competitive all-inclusive price** among the applications from the same country.

2) The highest-ranking applications will enter **Stage Two**. In this stage, the applications with the most attractive prices from all of Africa, Southeast Asia, or Latin America will be evaluated. The funding will be awarded to the 5 to 10 applications that rank highest in this stage, based on the following criteria:

   a) **Relevance** of the research topic in the region of operation (50% of the Stage Two score), according to the sub criteria: 1) number of people without access to energy and/or water & sanitation services in the outreach region of the institution (regions covered); and 2) number of rural households according to national statistics.

   Up to 50 points will be awarded, on the following scale:

   - *0-10 points: insufficient/no relevance*
   - *11-20 points: sufficient relevance*
   - *21-30 points: satisfactory relevance*
   - *31-40 points: good relevance*
   - *41-50 points: very good relevance*

   b) **Individual experience** of the project coordinator involved in executing the task (50% of the Stage Two score) with non-financial programs focused on access to basic services, their experience with customer surveys (e.g. market assessment, impact evaluation, etc.), and their responsibility in this assignment, outlined in a short **concept** note.

   Up to 50 points will be awarded on the following scale:

- *0-10 points: insufficient/no experience*
- *11-20 points: sufficient experience*
- *21-30 points: satisfactory experience*
- *31-40 points: good experience*
- *41-50 points: very good experience*

6.　Legal and Financial Framework

The details of the assignment will be set out in a written contract after the contract is awarded, a draft of which is attached to this document. When submitting a tender the applicant approves of the agreements layed out in the contract in case of being assigned with the task.

No reimbursement of expenses related to the preparation of any tender will be made by IASS.

7.　Tenders

Please submit your application by e-mail to Natalia.RealpeCarrillo@iass-potsdam.de by **February 10, 2020 at the latest.** You have to fill out the application form (see attachment), providing the details regarding the eligibility criteria, selection criteria (including the number of staff members that will be participating in the data collection and a concept note), and a financial quote in Euros.

If you have any questions regarding the assignment, please contact Natalia Realpe Carrillo (Natalia.RealpeCarrillo@iass-potsdam.de). We will try to answer as quickly as possible and will provide all institutions asked to apply with Q&As via e-mail.

IASS reserves the right to modify or cancel all or part of the call for tenders, should the need arise, without having to justify its action and without such action conferring any right to compensation on the tenderers. IASS reserves the right to extend the deadline for receipt of the tenders. In that case, all the applicants and tenders will be subject to this new deadline.

Potsdam, December 14, 2020

Annexes
Application form
Draft of a contract regarding this call for tenders (for informational purposes at this point)

Annex: Application form

Applicant Details

Name of Institution:	
City, Country:	
Legal Form:	
Website:	
Name of contact person for the application:	
Email:	
Phone:	

Tender

Describe your organization's experience working with research institutions (**Eligibility Criterion 1**). (max. 2800 characters)	
Describe your organization's experience in offering financial products (**Eligibility Criterion 2**). (max. 2000 characters)	
Eligibility Criterion 3: Number of loan officers that will be involved in the data collection project	
Eligibility Criterion 4: Please check (Yes) or **(**No)	We can provide mobile Android devices to the selected loan officers for data collection. Yes _____ No_____
Eligibility Criterion 5: Please enter the name(s) of the language(s) and then check (Yes) or (No)	The language(s) in the region for collecting research data we are applying for is/are:_____ We can conduct the data collection in this/these language(s). Yes _____ No_____
Selection Criterion 1: Total budget & cost breakdown (EUR)	

Selection Criterion 2: How is the research topic relevant in the institution's region of operation? (max. 1000 characters)	
Selection Criterion 3: List of loan officers 1. Name 2. Individual experience in the field 3. Responsibility in expected assignment	

Place, Date   Signature