

ANNEX A: TERMS OF REFERENCE
RFP/24/016/DENMARK/PSP
Request for proposal for SMS inbound and outbound services for UNHCR Private Sector
Partnerships in Denmark

Bidders are required to submit any request for clarification or any question in respect of this ToR by e-mail to galer@unhcr.org.

TABLE OF CONTENTS

1	INTRODUCTION	3
1.1	Background.....	3
1.1.1	Private Sector Partnerships (PSP) in Denmark	3
1.2	Statement of purpose and objectives.....	3
1.3	Pre-selection criteria.....	4
1.4	Joint venture, subcontracting	4
2	REQUIREMENTS.....	5
2.1	SMS inbound and outbound services	5
2.2	Integration to Salesforce and other systems	7
2.3	Account management services	7
2.4	Performance of Work.....	8
2.5	Compliance with the Government Requirement	8
2.6	UNHCR data protection clause	8
2.7	UNHCR general terms and conditions	8
3	CONTENT OF YOUR PROPOSAL	9
3.1	Technical offer	9
3.1.1	Company Qualifications	9
3.1.2	Proposed Services.....	9
3.1.3	Account management services	9
3.2	Financial offer.....	9
4	EVALUATION	10
4.1	Technical Evaluation	10
4.2	Financial Evaluation.....	11
5	CUSTOMER RESPONSIBILITIES	12

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1 INTRODUCTION

1.1 Background

The office of the United Nations High Commissioner for Refugees (UNHCR) was created in 1950, during the aftermath of the Second World War, to help millions of Europeans who had fled or lost their homes. We had three years to complete our work and then disband.

Since, the 1951 Refugee Convention has been strengthened by additional regional legal instruments. Today, 70 years later, our organization is still hard at work, protecting and assisting refugees and internally displaced (IDPs) around the world. In more than five decades, the agency has helped tens of millions of people to restart their lives. Today, UNHCR is one of the world's principal humanitarian agencies. Its staff of more than 20,000 personnel is helping more than 110 million people in 135 countries. Staff members work in a diversity of locations and conditions including our Geneva-based Headquarters (HQ) and more than 100 field locations. For more information on UNHCR, please see www.unhcr.org.

1.1.1 Private Sector Partnerships (PSP) in Denmark

The primary purpose of the UNHCR Private Sector Partnerships Services (PSP) in Denmark is to generate income from individual donors, corporates, and foundations, to support UNHCR activities worldwide; PSP activities in Denmark include two different main programs; Individual Giving (IG), raising money from individuals both regular and one-off, and Private Partnerships and Philanthropy (PPH) seeking support from companies, foundations, and High Net-Worth individuals.

1.2 Statement of purpose and objectives

UNHCR Denmark is rapidly growing its fundraising programs, with active acquisition programs for new monthly and one-time donors. To support our acquisition and retention efforts we are looking to increase the use of SMS inbound (payment) and outbound services from which we have historically seen positive return on investment.

The UNHCR PSP team in Denmark is looking for a competent in-country, external provider for the provision of SMS inbound (payment) and outbound services for two (2) years plus one (1) year extension upon satisfactory performance. The service commencement date is upon completion of the selection process, tentatively from January 2025:

Phase 1 – 1st of January 2025 – 31st of December 2026 (2 years)

Phase 2 - 1st of January 2026 – 31st of December 2027 (1 year)

The implementation of the SMS gateway is set tentatively in January 2025. It should be noted that integration to Salesforce is not part of the initial start-up but will be conducted at a later agreed date between PSP Denmark and the selected Supplier.

The service provider(s) will be asked to maintain their proposed pricing structure for the contract. In case of 4T¹ fee will change throughout the years, this fee will be adjusted in the winner company's financial offer, upon discussion and approval granted from PSP Denmark.

¹ *4T handles payment for donations <https://4t.dk>

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PSP Denmark is looking for contracting more than one service provider to have a main and back-up vendor for the services, if possible.

The providers are expected to have a sound knowledge of the Danish fundraising market and collaborate efficiently and professionally with the Danish telecom vendors and other sub-suppliers and stakeholders.

1.3 Pre-selection criteria

Only companies compliant with the above mandatory pre-selection criteria will be considered as eligible for technical evaluation.

Criteria (pass or fail)	Documents, information to be provided to establish compliance with the set criteria
Your company must be registered and eligible to do business in Denmark	<p>To establish compliance with these criteria:</p> <ol style="list-style-type: none"> 1. Copy of Certificate of Business Registration/ Certificate of Incorporation is to be sent* 2. Vendor registration form to be filled out and submitted (Annex C)* <p><i>* In case your company is a registered PO supplier to UNHCR, i.e., you have already received purchase orders, there is no need to re-send the above documents unless some changes are to be implemented on your current profile (address, bank account etc.). Please add the necessary comments to your technical offer. Compliance with the rest of the pre-selection criteria is still mandatory.</i></p>
At least 5 years of experience operating short-code-based services in Denmark	At least 5 years proven experience operating short-code-based services in Denmark, please list relevant projects (completed and on-going) with the name of client(s) from the past 5 years. Please clearly indicate start and end date of the projects to establish compliance with this criterion.

1.4 Joint venture, subcontracting

Please be informed that joint venture, or contractor/subcontractor relationships are allowed. In either case, the bidder needs to confirm which company is the project lead to take responsibility for the commercial relationship. The bid is to be submitted under one company, as leader. The winning bidder will be the contracted party, responsible for performance. UNHCR will deal with only one party (as single legal entity) for the administration of the contract, in case of selection. Please read carefully UNHCR General Terms and Conditions (Annex D, page 3, clause 5) about subcontracting.

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2 REQUIREMENTS

2.1 SMS inbound and outbound services

The estimate of volumes below is presented monthly for the sake of simplicity, but it should be noted that the volumes will not be evenly spread out during the months. There will be periods with low volumes and other periods with high volumes e.g., during emergencies and other large campaigns.

Description of services	Details	Expected volumes
<p>Provide a reliant INBOUND SMS payment gateway including:</p> <ul style="list-style-type: none"> a) unique short codes (overtaxed) to receive both regular and one-off private donations across mobile networks in Denmark. b) unique short codes for opt-in to e.g. newsletters, events and competitions (incl. instant win) and/or to participate in polls and petitions. <p>Within the system, UNHCR should easily be able to:</p> <ul style="list-style-type: none"> • select and activate short codes • select donation value for each short code • set up automated thank you/failed message responses. <p>The system should include SMS Inbox services and reply mechanisms.</p>	<p>Please provide details of your INBOUND SMS payment module including screen shots views of how to create short codes, select/change donation value, delete short codes, create automatic thank you/failed message responses and other deliverables described under Inbound SMS.</p> <p>Please also indicate the maximum capacity of incoming SMS messages per minute.</p>	<p>20-50 active short codes per year.</p> <p>Monthly volumes of Inbound SMS, which triggers SMS donation (overtaxed); 4,000-6,000 with an annual 60% increase year 2 and 3 and a 30% increase year 4 and 5.</p> <p>Without donations. 1,500 a month with an annual increase of 50%.</p>
<p>Provide SMS OUTBOUND marketing campaign module including:</p> <ul style="list-style-type: none"> a) Bulk SMS PUSH campaigns b) Segmented campaigns c) Automated campaigns for donor journeys (based on individual donors' actions) 	<p>Please provide details of your SMS outbound campaign module, and please provide screen shots of to create outbound messages, upload/segment lists, exclude opt-outs and dispatch outbound campaigns.</p> <p>Please also indicate your maximum capacity i.e., the volume of outbound messages sent per minute with a 98-99% deliverability.</p>	<p>Monthly volumes of outbound SMS: 60,000-85,000 with an annual increase 50%² year 2 and 3 and a 20% increase year 4 and 5.</p> <p>In addition, we expect to send out large volumes of SMS messages to cold audiences: Up to 1,000,000 messages in 1-7 days.</p>

² Please note that outbound SMS messages may exceed 160 characters and thus 2 SMS messages are triggered instead of one. The volume reflects that outbound SMS messages exceed 160 characters but are no more than 319 characters.

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Create and build SMS groups ; a) create and monitor different audience lists b) manually upload donor data (upload of excel and csv files) c) automatic removal from list upon opt-out	Please describe the solution and provide screen shots of how lists are imported/exported and can be monitored.	
Provide DASHBOARD for all incoming and outgoing SMS services licensed to UNHCR. This includes. <ul style="list-style-type: none"> Monthly inbound and outbound traffic reports, including total income, income by keyword, income by segment, number of successful vs. failed messages, details of teleoperator, etc. Stats on outbound messages including delivery and other stats. 	Please describe your solution and provide screen shots the key performance metrics available in your dashboard.	
Provide short codes that are unique (not shared) for UNHCR (at an additional cost)	Please describe your solution	
Provide two factor authorization	Please confirm.	
Capability and deliverability	Please specify the capability and deliverability of the SMS gateway, both for Inbound and Outbound SMS. During breaking news or an emergency, it is vital that many SMS messages can be processed with a 98-99% deliverability.	Inbound volume during emergencies: 8,000 a day, 85% annual increase. Outbound volume: 1,000,000 in one day.
Real time data.	Please specify.	
Provide the ability to manually export traffic as csv or text file	Please specify.	
Ability to whitelist IP's to give users locate outside DK access	Please specify.	
GDPR: The ability to anonymize data based on a specific phone number or based on time	Please specify.	
Provide open API which enables easy integration to Salesforce and other systems	Please specify API solution.	

Additional note: The volume of inbound and outbound may vary and is subject to UNHCR's confirmation. Each abovementioned requirement will be defined to the awarded SMS gateway agency through a specific "Statement of Work" (SOW) and corresponding purchase order (PO).

Please note, that the technical requirements above may develop over time as UNHCR expands its activities. Therefore, new technical features may be requested within the scope and time of this project.

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PSP Denmark is also expecting that the Supplier will be able to deliver any kind of SMS gateway services commonly used by the private (for profit) sector and the non-for-profit sector that is not specified in the above.

2.2 Integration to Salesforce and other systems

The supplier is requested to describe the details of an integration module, with a particular emphasis on the integration to Salesforce, including the compliance with the requirements listed below:

- The SMS service should have an API providing third parties access to the services' data – please provide details on API's available: type of API, Data available, documentation, etc.
- The SMS service should provide data import and export via CSV files.
- The SMS service could have a Salesforce connector that can be configured to push (and pull) data into Salesforce.
- Please provide any additional information on integration options and techniques
- Mobile number must be the unique identifier.

2.3 Account management services

- Minimum requirement: Working hours 8.00-16.00 (Mon-Fri); with an emergency hotline for technical support and trouble shooting.
- Technical capacity must be specified, including a) maximum volume of inbound SMS messages per minute b) maximum volume of outbound SMS messages per minute and c) percentage of uptime and deliverability.
- The Supplier will specify the guaranteed minimum throughput capacity (MT) for each telecom network, or in case no differences exist between networks, then an overall guaranteed minimum throughput capacity (MT) should be specified.
- The Supplier shall specify the guaranteed uptime of its SMS gateway servers and report any faults to UNHCR without delay.
- The Supplier shall provide alerts of when there are technical faults with telecoms once the fault has lasted more than 2 hours. The Company will report any faults to UNHCR without delay.
- The Supplier will manage relationships with the telephone networks to fix technical faults and billing discrepancies.
- The Supplier is responsible for any unforeseen costs introduced by telephone networks. These are not to be passed along to UNHCR without explicit consent. The Company will be responsible for any new costs not captured in the contract. Any cost and tax introduced by the telecom operator should be mutually agreed.
- UNHCR aims to launch fundraising activities within 48 hours after an emergency. In case of Emergency or during a large campaign, the Supplier must ensure technical capacity and management of a high volume of SMS Inbound and Outbound messages in a very limited time.
- The Supplier must specify its capability and deliverability during such times.
- Also, it should be specified if working hours remain the same or if they could possibly be increased or a hotline established in case of an important emergency campaign.

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2.4 Performance of Work

The appointed Supplier is responsible to provide all supervision, equipment, labour, and materials necessary to complete the work as described herein. The Supplier shall supervise and complete the project using its best skill and attention. The Supplier shall furnish management, supervision, coordination, labour, and services which (i) expeditiously, economically, and properly complete its scope of work, (ii) comply with the requirements of this Terms of Reference.

All services rendered by the Supplier shall be performed by or under the immediate supervision of persons possessing expertise in the discipline of the service being rendered.

The Supplier shall conduct all its activities in strict confidence. The Supplier shall handle and respect data privacy, if applicable, in a professional manner.

2.5 Compliance with the Government Requirement

The Supplier shall comply with all Danish applicable laws, statutes, ordinances, codes, rules, regulations and lawful orders of all governmental, public, and quasi-public authorities and agencies having jurisdiction over the project. In addition, the Supplier should comply with the European General Data Protection Regulation (GDPR) and explain in their proposal how this is handled at the agency level.

2.6 UNHCR data protection clause

The selected company will be requested to acknowledge UNHCR data protection clause, Annex D.

2.7 UNHCR general terms and conditions

The selected company will be requested to acknowledge UNHCR general terms and conditions, acceptance of Annex E.

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3 CONTENT OF YOUR PROPOSAL

To ensure a fair and transparent technical assessment, please DO NOT include any financial information in your technical proposal. Including information on pricing in the technical proposal will lead to disqualification.

3.1 Technical offer

3.1.1 Company Qualifications

It is considered essential for the agency to comply with the following requirements to participate in the RFP (Request for Proposal). During the technical evaluation, in this section, the panel will score the company's experience as a SMS gateway provider.

3.1.2 Proposed Services

During the technical evaluation, in this section, the panel will score your company's compliance regarding the required services listed under section 2.1 and 2.2.

3.1.3 Account management services

During the technical evaluation, in this section, the panel will score your company's compliance regarding the required services listed under point 2.3.

3.2 Financial offer

Please use only Annex B (Financial Offer) to provide your corresponding fees and cost breakdown. **Financial Offer must be submitted separately from the technical offer.**

In the financial offer, please indicate your scalable bulk SMS pricing model, including tiered pricing based on volumes of inbound/outbound SMS. Please specify any price reductions based on high volumes of messages.

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4 EVALUATION

Only companies compliant with the mandatory pre-selection criteria will be considered as eligible for technical evaluation. Please refer to section 1.3.

4.1 Technical Evaluation

The Technical Offer will be evaluated using *inter alia* the following criteria and percentage distribution (on a 100 points scale), 70% (i.e. maximum 70 points) obtainable from the technical offer.

The minimum passing scores of the evaluation is 42 out of 70, if a bid does not meet these minimums it will be deemed technically non-compliant and will not proceed to the financial evaluation.

Company Qualifications (max 12.5 points)	Documents, information to be submitted to establish compliance with the set criteria.
Experience providing SMS gateway services in the private and non-profit sectors	The scores will be allocated for the number of SMS gateway solutions projects, currently on-going and/or completed (in total) in the private and non-profit sector, based on the evidence provided. Please provide a list of your clients/projects.
Proposed services (max 45 points)	Documents, information to be submitted to establish compliance with the set criteria.
Compliance with the requirements listed under 2.1. SMS inbound and outbound services (max 25 points)	Comprehensive proposal presented by addressing all requirements under 2.1 Technical specifications. Please ensure to include: 1) Screen shots of key system functionalities with a view of creating short codes and messaging, list building, analytics, traffic reports, importing/exporting data and other deliverables listed under 2.1. The scores will be allocated based on the clarity and quality of the proposal for SMS inbound and outbound services.
Compliance with the requirements listed under 2.2. Integration to Salesforce and other systems (max 20 points)	Comprehensive proposal presented by addressing all requirements under 2.2. for the integration to Salesforce and other systems via webhook, API and connectors, data import and export. The scores will be allocated based on the clarity and quality of the proposal for Integration to Salesforce and other systems services.
Account management (max 12.5 points)	Documents, information to be submitted to establish compliance with the set criteria.
Compliance with the requirements listed under 2.3. account management	Comprehensive proposal presented by addressing all requirements under 2.3. for account management, your company's customer service strategy to

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	<p>support UNHCR Denmark to the best possible extent. Please add a short CV of the account manager assigned to UNHCR.</p> <p>The scores will be allocated based on the clarity and quality of the customer service strategy and the relevant experience of the account manager.</p>
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4.2 Financial Evaluation

Please use only Annex B to provide a financial offer.

The financial component is 30% of the total scores. The maximum number of points (30) will be allotted to the lowest price offer. All other price offers will receive points in inverse proportion to the lowest price. The comparison will be based on UNHCR's requirements. No optional services will be included.

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5 CUSTOMER RESPONSIBILITIES

PSP Denmark will be responsible for;

- Appointing a dedicated project manager;
- Receiving adequate training in the system management
- Provide support for the implementation process and liaise with internal project team especially in terms of integration to Salesforce
- Be responsible for setting up and executing SMS campaigns in the system with the assistance of the Supplier(s) if needed
- Be responsible for creating short codes in the system