**Response to Questions on RFP for Data Portal**

**Date: 17/01/18**

**Department: Knowledge Management**

Question 1: Please advise if we could apply as individual team and not as a firm. Our team has designers and developers with a respective experience of 5-6 years of data portals, Project information management systems, and other websites/ software'. Given this context, please advice if we can still apply given your published criteria, we are ineligible? Perhaps exemption or changes in requirements?

* Demonstrable experience in UI/UX projects – around 10 years for company
* Strong background of team in UI/UX – around 5 years for each staff member
* Delivery of technical training on hosted platforms and data portals – 5 years
* Demonstrable experience in data portal management and troubleshooting. At least 5 years of managing retainership arrangements/relationships

Response # 1: It is necessary to apply as a registered firm. Teams of individual consultants will not be eligible. However, if the team has individuals with the requisite experience in required areas (UI/UX, retainership management, etc.), it should be highlighted to compensate for any limitation the applicant firm may have.

Question 2: With reference to your RFP- on Karandaaz Data Portal, I just wanted to know a company having 2 years of legal status could be eligible to submit the proposal. As per the condition defined in RFP company must provide its five years annual Tax returns and other financial status

Response # 2: All applicants should be registered entities. Applicants may submit tax returns and financial statements for a maximum of five years, or for the number of years the firm has been registered.

Question 3: Financial and credit access and utilization data about How many sectors with in the domain of SME is required? Like e.g. how many industries and industrial sectors one has to research for data collection and updating, other than those have been given in the RFP?   
Response # 3: The objective of the Karandaaz data portal is intended to be based on an exhaustive data set, with the vision that the portal becomes a one-stop shop for accessing statistics relating to financial inclusion in Pakistan.

Question 4: What will be major analytics/data modelling and inference requirements other than trends and YoY comparisons? (major requirements will surely help in resource estimation)

Response # 4: Proposed analytics for the platform will be one of the key aspects through which technical proposal will be evaluated.

Question 5: Is there any requirement of keeping an economist/SME sector expert/ on board even during the back stopping phase?

Response # 5: There is no requirement of keeping an economist/SME sector expert in the team but in-depth understanding of financial inclusion data is essential, which should be demonstrated in the proposal.

Question 6: Can you please elaborate/explain section 32.a explaining conditions for Avoidance of Conflict of Interest in the "Section 3: procurement policy - vendor conduct". The point is copied here: "firm shall be considered to have a conflict of interest in a procurement process if: a.       Such firm is providing goods, works, or non-consulting services resulting from or directly related to consulting services for the preparation or implementation of a project that it provided or were provided by any affiliate that directly or indirectly controls, is controlled by, or is under common control with that firm; or"

Response # 6: the clause states that, for the subject procurement, the consulting firm must not have any affiliation with the firm providing goods, works, or non-consulting services and vice versa.

Question 7: In Section 4: Terms of Reference, under qualifications section, 'Evaluation Prerequisites and Criteria' sub-section, it states that: Applicants will need to meet the following pre-requisites: "Has audited accounts and tax returns for a minimum of five financial years" Can you please further explain how will the applicant be required to establish this requirement? Is the applicant required to provide copies of tax returns and audited accounts for past 5 years as part of proposal submission or just a proof from the auditor stating compliance with this requirement?

Response # 7: Copies of Registration Certificate, Tax Returns and Audited Financials should be submitted in a separate package marked “Pre-requisites.”

Question 8: In Section 4: Terms of Reference, under qualifications section, 'Evaluation Prerequisites and Criteria' sub-section, it states that: "Demonstrable experience in UI/UX projects – around 10 years for company" This seems in conflict with the requirements of the company's operation of 5 years. Will an experience of UI/UX projects of 10 years by lead team member be sufficient to meet this criteria?

Response # 8: See response to Question 1

Question 9: In Section 4: Terms of Reference, under qualifications section, 'Evaluation Prerequisites and Criteria' sub-section, it states that: "At least 5 years of managing retainership arrangements/relationships" Is the applicant expected to show retainer-ship arrangements with one particular client for 5 years? or does the statement refer to 5 years cumulative experience of the company in managing retainer-ship arrangements with its overall client base?

Response # 9: Cumulative experience in managing retainerships is sufficient, although retainership arrangements that have successfully spanned multiple years will be more advantageous.

Question 10: Will the inception meeting (Phase 1) be in-person or online? If in-person, should we include the related travel expense in the proposal?

Response # 10: If the successful applicant is not based within Pakistan, the inception meeting may be convened online.

Question 11: Is the vendor required to spend time on-site? If so, what is Karandaaz's expectation?

Response # 11: The vendor is not required to spend time on-site, provided that satisfactory services can be provided virtually.

Question 12: Phase 1 includes discussing and finalizing list of indicators. Is the vendor expected to contribute to deciding which indicators to include?

Response # 12: The vendor will be expected to contribute to deciding the final indicators. It is highly recommended that applicants make suggestions at the proposal stage as well.

Question 13: What difference does Karandaaz see between "search engine" and "keyword search" - both of which are mentioned in the guidelines.

Response # 13: Ideally, the “search engine” shall allow the audience of the portal to search any term, phrase or word relating to financial inclusion. The “Key Word” search relates to frequently searched metrics, with a dynamic list appearing on the side of screen, and can be used as prompts to encourage users to explore the portal.

Question 14: Does Karandaaz already have the list of sources to get the data? Has Karandaaz obtained permission from the data sources for accessing the data?

Response # 14: It is expected that the consulting firm will collate secondary data that is publicly available.

Question 15: What language(s) should be supported by the portal?

Response # 15: The portal will be required to only support the English language

Question 16: One of the key costs in this project is the data collection. This is dependent on the number of data sources, the formatting of the data, the cleanliness of the data, and the size of each data source. Without having a clear idea of the data size and data quality, it will be hard to estimate the cost of this part. Can Karandaaz provide a guidance towards this?

Response # 16: Karandaaz expects that the data collated by the vendor for the portal should be exhaustive and should cover all publicly available financial inclusion data sources in Pakistan. The vendor will be expected to ensure data entry, formatting, cleaning and accuracy. The associated costs with these activities should be part of the financial proposal.

Question 17: It looks like this is a public portal. Do you want to support user log in so that users can save charts/data?

Response # 17: Karandaaz is open to any creative suggestions that enhances user friendliness of the portal and provides value to a variety of users, financial service providers, policy makers, academics, and Karandaaz staff among others.

Question 18: Will local Pakistan-based submissions get preferential treatment over submissions from foreign firms?

Response # 18: Preferential treatment will not be given to any firms based on location. All proposals will be given due consideration as per the guidelines of the RFP.

Question 19: We are a US-based firm. If we submit a proposal, is the expectation that we have to mail in the proposal with the hard copy by Jan 25th deadline? If that is the case, in order to meet the deadline, we would have to mail out the proposal within 3-4 days. We wanted to confirm that was the intention with the timeline presented in the RFP?

Response # 19: The soft copies of all proposals need to be submitted before the identified deadline of January 25. Hard copies may be received after the deadline, but as soon as possible.

Question 20: The timelines for the development of such an information portal containing multiple sector information is very short. This can only be defined after the scope is clearly mentioned and agreed upon.

Response # 20: Karandaaz will evaluate proposals based on the proposed scope and timeline.

Question 21: One of the major component of the Project would be identification of data sources in each sector, in consultation with industry stakeholders, is itself an ongoing process. This cannot be limited at the initial phase of the project. Functional consultants from each sector would be required to analyze and shortlist data items. Until the above point (2) is finalized and defined, the project scope would cannot be defined. The format and size of data items may drastically vary in each industry segments.  Extraction, Transformation and loading (ETL) of the data items would be needed for all identified data items.

Response # 21: At the proposal stage the applicant would be required to show knowledge and in-depth understanding of financial inclusion data for Pakistan. Applicants should focus on identifying publically available data sources which will be finalized in mutual agreement with Karandaaz at the inception stage. All project activities should be reflected in the work plan.

Question 22: Financial inclusion statistics needs to be provided by Karandaaz Pakistan, as a technical vendors it would be difficult to measure them, prior to submission of the proposal.

Response # 22: See response Number 14 and 16

Question 23: Work Plan can only be finalized after complete definition of scope items mentioned above.

Response # 23: See response Number 21

Question 24: The phases defined in the RFP does not include development of Data-warehouse, which is integral part & parcel of any Analytical Portal to fetch required information from Data Cubes to be defined. These dimension of data cubes creates Business Intelligence Analytics for users

Response #24: Suggestions on the optimisation of the portal should be included in the technical proposal.

Question 25: If the project is already completely analyzed and designed with defined data sources and industry segment, then only it can be implemented in three months.  As per our past experience of such projects, this project may require at least 6-9 months and fully implemented in 12 months’ time, to cater all the ingredients required of the project

Response # 25: See response Number 20.

Question 26: What existing system or Data Portal are you currently using in Karandaaz Pakistan?

Response # 26: Karandaaz currently does not have a data portal

Question 27: What limitations are there in your existing system (if any)? Do you have any Business Processes automated by the current system? Would you like to have those implemented in the new Data Portal?

Response # 27: N/A

Question 28: What are portal users?

Response # 28: The users of the portal will be financial industry stakeholders, policy makers, academics, students and Karandaaz staff.

Question 29: What is the Technology / Development Platform preference? or we can suggest you Technology e.g. PHP or MVC Framework or [ASP.NET](http://asp.net/) MVC or any other.

Response # 29: Karandaaz does not have a technology preference. Cost, ease of use, time to market, and flexibility should all be considered while selecting a platform/technology.

Question 30: Which hosting solution you are interested in (VPS or Cloud hosting) e.g. AWS

Response # 30: Karandaaz does not have a preference for a hosting solution

Question 31: What is the source of the data?

Response # 31: See response Number 14 and 16

Question 32: How many Number of users, types of users required in your Data Portal

Response # 32: The audience of the portal is niche but the traffic is expected to grow with time

Question 33: What is the final Timeline?

Response # 33: The timeline mentioned in the RFP is twelve (12) weeks. Also see response Number 20.

Question 34: Any external or any 3rd Party APIs integrations required ?

Response # 34: See response Number 24

Question 35: Do you have any specific technology platform preference or the selection of technology is on the discretion of vendor?

Response # 35: See response Number 29

Question 36: Any specific requirements for security related to data maintenance?

Response # 36: Karandaaz does not have any specific preference related to security. The security guidelines may be proposed by the vendor.

Question 37: Can we limit the number of indicators for ease in effort estimations and sizing?

Response # 37: See response Number 16

Question 38: For certain data sources that might be paid, does Karandaaz expect to use paid data services that might not be otherwise publically available?

Response # 38: At this stage, only publicly available data sources may be used for the purposes of this portal.

Question 39: How many indicators are expected to be provided by the portal? Also please give us limiting factors that may help us scope of data collation efforts

Response # 39: See response Number 14 and 16

Question 40: Does Karandaaz have any role in data collection beyond identifying and finalizing indicators and data sources? Is the data collection effort from the vendor side ongoing after completion and delivery of live portal?

Response # 40:  See response Number 16. Karandaaz expects to enter into a retainership arrangement with the selected vendor to maintain the portal.

Question 41: Is there any specific need towards mobile phone users?

Response # 41: Mobile functionality need not be included in the technical or financial proposal.

Question 42: What are different types of users of the system, priority wise?

Response # 42: See response Number 28