

Request for Quote/Proposal (RFQ/RFP)

Commodity/Service Required:	Design, Development, and Deployment of the ESCO Certification and Expanded Solar PV Installer Registry Modules in the Energy Efficiency Portal for Applications and Registrations (EPAR) System
Type of Procurement:	One-Off Purchase Agreement
Type of Contract:	Purchase Order
Term of Contract:	6 months
Contract Funding:	U.S. Department of State (DOS)
This Procurement supports:	Energy Secure Philippines Activity (ESP)
Submit Proposal to:	Ms. Divina B. Chingcuanco Chief of Party, ESP RTI International via email: jvitan@energysecure.ph ; yatienza@energysecure.ph
Date of Issue of RFP/Q:	September 1, 2026
Date Questions from Supplier Due:	September 7, 2026 5:00PM Philippine Standard Time
Date Proposal Due:	September 15, 2026 5:00PM Philippine Standard Time
Approximate Date Purchase Order Issued to Successful Bidder(s):	On or before October 1, 2026
Method of Submittal:	
Email to jvitan@energysecure.ph ; yatienza@energysecure.ph	
Respond via e-mail with attached document in MS Word / pdf format. The Bidder/Seller agrees to hold the prices in its offer firm for 60 days from the date specified for the receipt of offers, unless another time is specified in the addendum of the RFP/RFQ.	
Solicitation Number:	ESP-RFP-2026-067

Attachments to RFP:

1. Attachment "A" – Commodity Specifications
2. Attachment "B" – Instructions to Bidders/Sellers
3. All PO Terms and Conditions are listed on our website at: [RTI-PO-Terms_English_Version - v1.21.pdf](http://www.rti.org/files/PO_FAR_Clauses_Commercial_Items.pdf) or for commercial items: http://www.rti.org/files/PO_FAR_Clauses_Commercial_Items.pdf (hereinafter the "Terms"). Supplier's delivery of products, performance of services, or issuance of invoices in connection with this purchase order establishes Supplier's agreement to the Terms. The Terms may only be modified in writing signed by both parties.

RTI International is a trade name of Research Triangle Institute. RTI and the RTI logo are U.S. registered trademarks of Research Triangle Institute.



3040 Cornwallis Road ■ PO Box 12194 ■ Research Triangle Park, NC 27709-2194 ■ USA
Telephone 919.541.6000 ■ Fax 919.541.5985 ■ www.rti.org

All bidders/sellers are responsible to carefully review each attachment and follow any instructions that may be relevant to this procurement.

RTI International is a trade name of Research Triangle Institute. RTI and the RTI logo are U.S. registered trademarks of Research Triangle Institute.

Attachment “A”

Commodity Specifications

Statement of Work

Description of Activity/Service:

RTI International (RTI) is a global, independent research institute with almost 60 years of experience in creating and translating knowledge into practice. RTI has wide expertise in at least 250-degree fields working to unlock value in eight practice areas including: health, education, energy, environmental sciences, and innovation ecosystems.

RTI is currently implementing Energy Secure Philippines (ESP), which is a multi-year program that aims to assist the Government of the Philippines (GPH) in promoting a more competitive power sector through investment mobilization, deployment of modern energy technologies, and support in policy reforms and regulation. ESP’s overall goal is to enhance energy security and reliability in the Philippines. It focuses on advancing inclusive economic growth and resilient development through increased private investment, promoting advanced technology deployment, and boosting the energy sector’s resiliency.

In partnership with the Philippine Department of Energy (DOE), ESP supports the implementation of Republic Act No. 11285, otherwise known as the Energy Efficiency and Conservation (EEC) Act. Under the law, the Department of Energy (DOE) is authorized to develop and maintain the National Energy Efficiency and Conservation Database (NEECD), comprised of various systems and websites, including the Energy Efficiency Portal for Applications and Registrations (EPAR) System. These platforms support policy enforcement, compliance monitoring, and data management, ensuring adherence to energy efficiency regulations.

The EPAR System is the centralized online system of the DOE for the registration and application of certifications and recognitions related to energy efficiency practitioners, including energy service companies (ESCOs), recognized training institutions, and other entities under the EEC Act and its Implementing Rules and Regulations (IRR).

To fully operationalize the regulatory requirements for ESCOs and to expand coverage to Solar Photovoltaic (PV) installers, the EPAR System requires the development of two (2) new/enhanced online application modules: (1) an ESCO Certification module covering ESCO registration, certification, classification, project and contract management, reporting, monitoring, verification, compliance, financial administration, and public registry functions; and (2) an Expanded Solar PV Installer Registry module covering installer registration, project reporting, compliance and enforcement management, product documentation, and public information functions.

This engagement covers the design, development, testing, user acceptance testing, training, and turnover of both modules as fully integrated components of the live EPAR System at <https://epar.doe.gov.ph>.

Product or Service Expectations (both if applicable):

The objective of this engagement is to secure the services of a qualified Service Provider (SP) for the design, development, testing, user acceptance, training, and turnover of the EPAR System's ESCO Certification module and Expanded Solar PV Installer Registry module, within a fixed period of six (6) months from receipt of the Notice to Proceed (NTP), such that the following are delivered:

- a. A fully functional, secure, and end-user-accepted online application system, integrated with the existing EPAR core platform, that automates the registration, certification, monitoring, and compliance processes for ESCOs and Solar PV installers;
- b. Complete technical and user documentation, and a fully trained core group of end-users and administrators, enabling the end-user to operate and maintain the module with minimal reliance on the SP after turnover;
- c. Full and unencumbered ownership (by ESP or the DOE, as shall be indicated by ESP to SP) of all source code, designs, and documentation produced under the engagement, delivered in a manner that leaves no technical or contractual loophole that could compromise the end-user's continued, independent use of the module.

Deliverables, Timelines, Special Terms and Conditions:

Scope of Work

Engagement Duration and Phases

The engagement shall cover a period of one hundred eighty (180) calendar days (six [6] months), structured into six (6) key and minimum phases with corresponding minimum deliverables, as summarized and detailed below:

Phase	Key Activities	Minimum Deliverables	Target Timeline (From contract award)
Phase 1: Inception and Design	Project kick-off; requirements elicitation; system and UI/UX design	Inception Report; approved SRS/Functional & Technical Specifications; approved System/Technical Design Document; approved UI/UX Design	October 01-31, 2026
Phase 2: Development of the Module	Build-out of all functional requirements in Annex A; iterative sprint development; unit testing; concurrent documentation	Module deployed and functional on the staging environment; sprint/progress reports; cumulative source code in a repository accessible to the end-user	November 01-December 31, 2026
Phase 3: Testing	System Integration Testing (SIT); performance, security (VAPT) and	SIT Test Plan and Results/Defect Log; VAPT Report and Vulnerability	January 01 – 31, 2027

	compatibility testing; Privacy Impact Assessment (PIA)	Remediation Report; PIA Report	
Phase 4: User Acceptance	UAT workshop with DOE core user group; defect resolution; formal acceptance	UAT Test Plan/Scripts; UAT Defect Log and Resolution Report; signed User Acceptance Certificate	February 01 – 28, 2027
Phase 5: Training	End-User and Administrator training; development of manuals and training materials	Training Completion Report with attendance/evaluation; User Manual; Administrator/System Manual	March 01 – 31, 2027
Phase 6: Turn Over	Production deployment on the live domain; final documentation and source code hand-over; transfer of credentials	Live production deployment; complete Turnover Package; signed Certificate of Final Acceptance and Turnover	April 01 – 30, 2027

The day-ranges in the table above are fixed calendar-day deadlines reckoned from the award of contract, consistent with Phase 1 – Inception and Design of the Module to Phase 6 – Turn Over. ESP review, comment, and rework periods stated in the Acceptance Criteria of Sections 3.2 to 3.7 are deemed included within, and not additional to, the calendar-day duration of the phase in which they occur; the SP shall therefore submit each deliverable with sufficient lead time within the phase to allow such review and any required rework to be completed within the periods prescribed above. Compression of the SP's working time that results from this shall not, by itself, be a valid ground for extending the six (6)-month timeline.

The detailed functional and technical requirements that the module shall satisfy are set out in full in Annex A and form an integral part of this Scope of Work. In case of any conflict or ambiguity between the summary descriptions in this Section and Annex A, the more detailed and more stringent requirement in Annex A shall prevail.

Phase 1 – Inception and Design of the Module

The Service Provider (SP) shall:

- Conduct a Project Kick-off/Inception Meeting with ESP to confirm the project scope, work plan, communication protocols, and escalation matrix;
- Conduct a Requirements Elicitation Workshop (REW) with intended end-users and their Technical Working Group (TWG) to validate and finalize the functional and technical requirements set out in Annex A;
- Prepare and submit an Inception Report containing, at minimum, the detailed work plan and project schedule (Gantt chart), team composition and mobilization plan, risk

- management plan, communication plan, and draft test plan;
- d. Prepare a System Requirements Specification (SRS) or equivalent Functional and Technical Specifications document, to be reviewed and formally approved in writing by ESP prior to the start of development;
 - e. Prepare a System/Technical Design Document covering, at minimum, the system architecture diagram, entity-relationship diagram (ERD) and data dictionary, application programming interface (API) specifications, integration design with the existing EPAR core platform, and the security design of the module;
 - f. Conduct a User Experience (UX) Workshop and prepare the UI/UX Design (wireframes, mockups, and/or clickable prototype) for ESP review, comment, and formal approval.

Acceptance Criteria: All Phase 1 deliverables shall be reviewed by ESP within five (5) calendar days from submission. Any deliverable found deficient shall be returned to the SP with written comments, which the SP shall incorporate and re-submit within five (5) calendar days. The SP shall not commence Phase 2 (Development) until the SRS, System/Technical Design Document, and UI/UX Design have all been formally approved in writing. Any development undertaken ahead of written approval shall be at the SP's own risk and cost.

Phase 2 – Development of the Module

The SP shall:

- a. Develop the module strictly in accordance with the approved SRS, System/Technical Design Document, and UI/UX Design, and in full conformance with the detailed functional and technical specifications in Annex A, with no deviation, omission, or substitution of any listed feature without prior written approval;
- b. Set up and configure a dedicated staging/development environment, separate and isolated from the production environment, meeting the minimum specifications in Annex C;
- c. Conduct iterative/sprint-based development with progress demonstrations and walkthroughs to intended end-users at intervals of not more than two (2) weeks;
- d. Perform unit testing and internal code review prior to each demonstration, and maintain a cumulative log of test coverage;
- e. Maintain and continuously update the complete source code in a version-control repository (e.g., Git — a version-control system used to track and manage changes to source code over time) to which personnel of intended end-users shall be granted read access throughout the engagement, and not only upon turnover, to safeguard continuity of the project in the event of delay, dispute, or early termination;
- f. Apply data-privacy-by-design and secure coding practices consistent with accepted data security standards and Republic Act No. 10173 (Data Privacy Act of 2012), its Implementing Rules and Regulations, and the DOE Data Privacy Policy, including but not limited to encryption of data at rest and in transit, role-based access control, and audit logging of all critical transactions;
- g. Prepare, concurrently with development (not solely at turnover), draft technical documentation including API documentation, data dictionary, and inline code documentation.

Acceptance Criteria: The staging deployment shall demonstrate one hundred percent (100%) of the functional requirements specified in Annex A. No feature shall be considered delivered unless it is demonstrably functioning on the staging environment and traceable to a specific requirement in Annex A. ESP shall issue a written confirmation that the staging build is complete and ready for the Testing phase before Phase 3 may commence.

Phase 3 – Testing

The SP shall:

- a. Prepare a System Integration Testing (SIT) Test Plan and Test Cases, covering functional, regression, performance/load, compatibility (across specified browsers and devices), and usability testing, for review and approval prior to execution;
- b. Execute the approved SIT Test Plan and log all findings in a Test Summary Report/Defect Log, with each defect classified according to the severity levels defined in Annex B;
- c. Conduct the Vulnerability Assessment and Penetration Testing (VAPT) of the module prior to User Acceptance Testing.
- d. Remediate all VAPT findings and submit a Vulnerability Management and Mitigation Report validating closure of each finding;
- e. Conduct a Privacy Impact Assessment (PIA) for the module and submit the corresponding PIA Report.

Acceptance Criteria: The module shall have zero (0) open Very High- or High-severity defects, and any outstanding Medium- or Low-severity defect shall have a written remediation plan and timeline agreed upon with DOE, before the module may proceed to User Acceptance Testing. All VAPT findings shall be remediated and independently re-validated with no unresolved Very High or High findings.

Phase 4 – User Acceptance Testing (UAT)

The SP shall:

- a. Conduct the User Acceptance Testing (UAT) Workshop(s) specified in Annex D with the core user group identified by ESP;
- b. Provide a dedicated UAT environment, UAT test scripts/scenarios, and facilitation support throughout the UAT period;
- c. Log all UAT findings and resolve all defects raised within the timelines set out in Annex B;
- d. Secure the formal, written User Acceptance and sign-off upon successful completion of UAT.

Acceptance Criteria: One hundred percent (100%) of the agreed UAT test scenarios shall be executed and passed, with zero (0) open Very High- or High-severity defects. The written User Acceptance Certificate is the sole and exclusive basis for proceeding to the Training phase and for the corresponding payment milestone. A deliverable that has not been formally accepted in writing shall not be deemed accepted for any purpose, including payment, regardless of use, access, or informal comment.

Phase 5 – Training

The SP shall:

- a. Conduct End-User Training and Administrator/System Training in accordance with Annex D, covering system navigation, module functions, and troubleshooting of common issues;
- b. Develop and provide a User Manual and an Administrator/System Manual, in both hard and electronic copies, written in a manner understandable to non-technical end-users;
- c. Provide all training materials, presentation decks, and hand-outs, and shoulder the cost of the training venue and meals for all training sessions, at no additional cost, exclusive of trainee-participants' own travel expenses;
- d. Administer a training evaluation/feedback form to all participants and consolidate results in the Training Completion Report.

Acceptance Criteria: A minimum of two (2) training batches (End-User Training and Administrator Training) shall be conducted, with duly accomplished attendance sheets and evaluation forms, and the User Manual and Administrator/System Manual shall be reviewed and approved in writing.

Phase 6 – Turn Over

The SP shall:

- a. Deploy the module to the production environment on the official live domain identified in Section 4, upon prior written go-live approval, and execute final data validation/migration where applicable;
- b. Turn over the complete and up-to-date project documentation, consisting at minimum of: the SRS, System/Technical Design Document, complete and buildable source code with clear build/deployment instructions, database schema and scripts, API documentation, Software Bill of Materials (SBOM), User Manual, Administrator/System Manual, and all test reports (SIT, VAPT, PIA, UAT);
- c. Transfer (to ESP or DOE, as shall be indicated by ESP to SP) all administrator-level access, hosting and domain credentials, source code repository ownership/administrator rights, and any third-party service accounts or subscriptions (e.g., email service provider, reCAPTCHA) procured under this contract, with no access of any kind retained by the SP after Turn Over;
- d. Assign and cause to be transferred (to ESP or DOE, as shall be indicated by ESP to SP) the full benefit of any manufacturer's, licensor's, or other third-party warranty, support entitlement, or software/service license obtained or subsisting in connection with the module as of Turn Over, together with all associated operating manuals, license keys/certificates, and technical documentation, to enable the end-user's continued, independent development, operation, and maintenance of the module thereafter;
- e. Conduct a formal Turnover Meeting and secure the signed Certificate of Final Acceptance and Turnover.

Acceptance Criteria: Prior to signing the Certificate of Final Acceptance and Turnover, the SP shall ensure that end-users' technical personnel, or any independent third-party verifier engaged by the end-user for this purpose, may independently verify — including, at the end-user's option, by rebuilding and deploying the source code from a clean environment — that the turned-over deliverables are complete, functional, and faithfully replicate the accepted production system. .

Hosting, Deployment and Technical Environment Requirements

The module shall be developed as an integrated component of, and shall be deployed on, the official DOE domain <https://epar.doe.gov.ph>. The SP shall not deploy any part of the module, whether temporarily or permanently, on any domain, subdomain, or hosting environment other than those expressly approved in writing.

- a. The SP shall maintain fully separate and isolated Staging/Development and Production environments at all times; the staging environment shall not be indexed by public search engines and shall not be used to process or store live/production data of ESCOs and Solar PV installers.
- b. The module shall be developed using the same technology stack as the existing EPAR core platform — NuxtJS, Node.js, TypeScript, PHP, and MySQL, deployed on cloud-based infrastructure — to ensure full compatibility and interoperability.
- c. The module shall integrate with the existing core platform and its database without disrupting, corrupting, or degrading any existing data, module, or function; any integration that risks such disruption shall first be tested in the staging environment and approved in writing before being applied to production.
- d. The module shall enforce HTTPS/TLS encryption for all connections, multi-factor authentication (MFA) for all administrator-level accounts, role-based access control, and audit logging of all critical transactions (create, update, delete, approval/rejection actions).
- e. The module shall follow secure coding practices consistent with the OWASP Top 10 (or its most current equivalent) and shall be free from known critical or high-severity vulnerabilities at the time of turnover, as validated under the Testing phase.
- f. The module shall be responsive and shall render correctly on the latest two (2) major versions of the most commonly used desktop and mobile browsers (including but not limited to Google Chrome, Microsoft Edge, Mozilla Firefox, and Safari), and shall, to the extent practicable, conform to Web Content Accessibility Guidelines (WCAG) 2.1 Level AA.
- g. Minimum infrastructure specifications for the Staging and Production environments are set out in Annex C. The SP shall procure, configure, and maintain the required cloud infrastructure, email service subscription, and bot/spam protection (e.g., reCAPTCHA) for the duration of the engagement, unless ESP elects to provide any of the foregoing, in which case the SP shall be notified in writing.
- h. All backups, credentials, encryption keys, and configuration files generated or used during the engagement shall be considered property (of ESP, unless otherwise

indicated by ESP) and shall be turned over in full at Phase 6 (Turn Over); the SP shall not retain any copies after Turn Over.

Source Code, Intellectual Property, and Documentation Ownership

- a. All source code, database schemas, system designs, UI/UX designs, documentation, and all other work product developed, customized, or configured under this contract (the "Deliverables") shall be the exclusive property of ESP (unless otherwise indicated by ESP) upon creation, and in any event no later than the corresponding payment for the phase in which they were produced. The SP shall not retain, reuse, resell, sublicense, or otherwise exploit any part of the Deliverables for any other client or purpose without prior written consent.
- b. The SP warrants that the Deliverables are original works, or that it holds all necessary rights, licenses, and permissions to assign the same to ESP (or DOE, as shall be indicated by ESP to SP), and that the Deliverables do not infringe any third-party intellectual property right. The SP shall hold ESP free and harmless from any claim, suit, or liability arising from any such infringement.
- c. The SP warrants that the Deliverables are free from malware, backdoors, hardcoded or default credentials, time bombs, license keys tied to the SP, or any other hidden, undisclosed, or unauthorized code or mechanism that could disable, restrict, or compromise the module or grant unauthorized access. ESP reserves the right to conduct, or engage a third party to conduct, an independent source code audit at any point during or after the engagement and the SP shall extend full cooperation thereto.
- d. Any open-source, third-party, or proprietary component, library, or framework used in the module shall be properly licensed for intended government use, and shall be fully disclosed in a Software Bill of Materials (SBOM) to be submitted in Phase 2 (Development) and updated as necessary at Phase 6 (Turn Over). The SP shall bear sole responsibility for any licensing fee, cost, or liability arising from the use of any such component.
- e. To prevent vendor lock-in and to safeguard continuity of the project in the event of delay, dispute, or early termination, the complete and current source code shall be maintained, throughout the engagement (and not solely delivered at Turn Over), in a version-control repository to which the end-user or its designated ICT personnel shall have continuous read access from Phase 2 onward.

Terms and Conditions

- a. The SP shall execute a Non-Disclosure Agreement (NDA) covering all confidential and personal data it may access in the course of the engagement, in line with prevailing data privacy and security standards, laws and regulations on information security and data privacy.
- b. The SP shall comply with Republic Act No. 10173 (Data Privacy Act of 2012), its IRR, and the DOE Data Privacy Policy in the handling of any personal or sensitive personal data encountered or processed in connection with the module.
- c. The SP shall not subcontract any material part of the design, development, testing, or

turnover work to any third party without prior written approval; any approved subcontractor shall remain the SP's sole responsibility and shall be bound by the same obligations.

- d. Any change, addition, or reduction in scope shall be raised writing and shall be jointly evaluated by the SP and ESP for its cost and schedule impact, and shall take effect only upon written approval. Changes outside the approved scope shall not, by themselves, justify an extension of the six (6)-month timeline unless expressly agreed in writing by ESP.
- e. All reports, manuals, and other documentary deliverables shall be submitted in both hard and electronic (editable and PDF) copies, in English or Filipino, and shall use prescribed templates where available.
- f. The SP shall designate a single point of contact (Project Manager) who shall be available during business hours for the duration of the engagement.

Service Provider Qualifications

The SP must have experience in the design, development, and deployment of online registration, certification, application, or compliance-monitoring systems similar in scope and nature to those described in this TOR. A "similar system" shall meet the following criteria:

- a. Utilization of equivalent technologies such as NuxtJS, Node.js, TypeScript, PHP, MySQL, and deployment on cloud-based infrastructure, or a functionally equivalent technology stack;
- b. Processing of data relating to energy efficiency and conservation, environmental compliance, or similarly regulated sectors;
- c. Demonstrated integration of the delivered system with an existing platform, indicating proven system-integration capability;
- d. Implementation for an organization comparable in size, regulatory mandate, and operational characteristics to the DOE.

The SP shall submit, as part of its eligibility documents, certificates of completion, end-user acceptance certificates, or equivalent client references for at least two (2) completed projects of similar scope undertaken within the last five (5) years, demonstrating compliance with the foregoing criteria.

Manpower Requirements

The SP must provide the notarized curriculum vitae (CVs) of its proposed staff, clearly showing relevant education, skills, and work experience. The SP shall provide, at minimum, the following personnel for the duration of the engagement (or the relevant phase(s) thereof), whose CVs shall be subject to ESP review and approval prior to deployment, and any subsequent replacement of key personnel shall likewise be subject to ESP prior written approval:

Personnel	Minimum Experience	Minimum Education	Min. No.
Project Manager	At least 3 years in project management, preferably in government or ICT development projects	CS/IT Degree or a related field	1
Business Analyst	At least 2 years in business/requirements analysis for web-based systems	CS/IT Degree or a related field	1
Solutions Architect / Technical Lead	At least 3 years in solutions architecture and system integration	CS/IT Degree or a related field	1
Full Stack Developers	At least 2 years in software development using the required technology stack	CS/IT Degree	2
User Interface/User Experience (UI/UX) Designer	At least 2 years in UI/UX design for web applications	CS/IT Degree or a related field such as Graphic Design or Human-Computer Interaction	1
Database Specialist	At least 2 years in designing and implementing RDBMS or NoSQL databases	CS/IT Degree or a related field	1
Quality Assurance/Test Engineer	At least 2 years in software quality assurance/testing, including use of automated testing tools	CS/IT Degree or a related field	1
Data Privacy Specialist	At least 2 years in data privacy and data protection	CS/IT/Law Degree or a related field	1
Cybersecurity Specialist/Information Security Officer	At least 2 years in application security, vulnerability management, and threat handling	CS/IT Degree or a related field	1

Payment Schedule And Timeline

The SP shall be paid on a milestone/deliverables basis according to the following schedule. No payment shall be released for any phase unless the corresponding deliverable(s) have been formally reviewed and accepted in writing in accordance with the Acceptance Criteria in the Scope of Work:

Milestone	Basis for Payment (Accepted Deliverable)	% of Contract Price	Delivery Schedule (From Contract Award)	No.
Phase 1: Inception and Design	Approved Inception Report, SRS/Functional & Technical Specifications, System/Technical Design Document, and UI/UX Design	15%	Within 14 days	1
Phase 2: Development of the Module	Staging deployment demonstrating 100% of Annex A functional requirements; DOE written confirmation of completion	30%	Within 90 days	2
Phase 3: Testing	Approved Test Summary Report/Defect Log; VAPT Report and Vulnerability Remediation Report; PIA Report	15%	Within 120 days	3
Phase 4: User Acceptance	Signed User Acceptance Certificate	15%	Within 140 days	4
Phase 5: Training	Approved Training Completion Report; User Manual; Administrator/System Manual	10%	Within 155 days	5
Phase 6: Turn Over	Signed Certificate of Final Acceptance and Turnover; complete Turnover Package	15%	Within 180 days	6

A retention of ten percent (10%) shall be withheld from every progress billing, to be released only upon signing of the Certificate of Final Acceptance and Turnover under Phase 6. The SP shall issue an official billing statement, with hard and electronic copies of supporting documents, for every corresponding activity/milestone.

Responsibilities of the Parties

The Service Provider (SP) shall:

- a. Coordinate with the End-User (ESP or DOE/EUMB, as shall be indicated by ESP to SP) as required, and designate a Project Manager as the single point of contact;
- b. Ensure the timely delivery of all outputs and deliverables in accordance with the timeline in Section 3;
- c. Provide all manpower, tools, licenses, and ICT subscriptions necessary for the design, development, testing, and turnover of the module, as specified in Annex C, except where ESP expressly agrees in writing to provide any of the foregoing;
- d. Shoulder the cost of conducting all trainings and workshops, including venue, meals, and materials, excluding trainee-participants' own travel expenses, as specified in Annex D;
- e. Execute a Non-Disclosure Agreement for all confidential and personal data accessed in the course of the engagement, upon receipt of the NTP;
- f. Maintain the complete and current source code in a repository accessible to the intended end-users throughout the engagement, and turn over all documentation, credentials, and licenses in full at Phase 6;
- g. Respond promptly, through the agreed communication channel, to ESP's technical queries, comments, and requests for revision at every phase;
- h. Immediately report to ESP, in writing, any actual or potential delay, risk, or issue that may affect the timeline or quality of any deliverable, together with a proposed mitigation plan.

ESP shall:

- a. Designate a Project Manager/TWG and identify the core user group for requirements validation, UX workshops, and User Acceptance Testing;
- b. Provide timely review, comments, and formal written approval or rejection of each deliverable within the periods stated in Section 3;
- c. Conduct briefings and/or coordination meetings with the SP as necessary, and facilitate progress meetings with relevant end-users at each phase;
- d. Determine the acceptability of deliverables and issue the corresponding written acceptance/sign-off, including the User Acceptance Certificate and the Certificate of Final Acceptance and Turnover;
- e. Provide access to existing system documentation, environments, and personnel reasonably necessary for the SP to perform integration, testing, and turnover activities;
- f. Oversee the overall management and direction of the project.

Required Administrative Documents

- Signed RFP document (page 15 and 20)
- Completed pricing table
- Proof of legal registration

- List of previous clients that are relevant to RTI business
- All countries compliant with Geocode 937 are listed in Annex 1

Pricing

Item #	Quantity to be Purchased	Description of Preferred Commodity or Services Specifications	Unit of Measure	Unit Fixed Price (Each)	Total Fixed Price (Each)	Lead Time Availability (Number of Days)
1						
2						
3						
Total Value						

By signing this attachment, the bidder confirms he has a complete understanding of the specifications and fully intends to deliver items that comply with the above listed specifications.

Signature:

Title:

Date:

Attachment “B” Instructions to Bidders/Sellers

1. **Procurement Narrative Description:** The Buyer (RTI) intends to purchase commodities and/or services identified in Attachment A. The Buyer intends to purchase the quantities (for commodities) and/or services (based on deliverables identified in a Statement of Work). The term of the Ordering Agreement shall be from Award Date to the Delivery date of the Offeror unless extended by mutual agreement of the parties. The Buyer intends to award to a single “approved” supplier based on conformance to the listed specifications, the ability to service this contract, and selling price. We reserve the right to award to more than one bidder. If an Ordering Agreement is established as a result of this RFQ/RFP, supplier understands that quantities indicated in the specifications (Attachment A) are an estimate only and RTI does not guarantee the purchase quantity of any item listed.
2. **Procuring Activity:** This procurement will be made by **Research Triangle Institute (RTI International)**, located at

Manila, Philippines.

(insert full address of the office)

who has a purchase requirement in support of a project funded by

U.S. Department of State

(insert client’s name)

RTI shall award the initial quantities and/or services and any option quantities (if exercised by RTI) to Seller by a properly executed Purchase Order as set forth within the terms of this properly executed agreement.

3. **Proposal Requirements.** All Sellers will submit a quote/proposal which contains offers for all items and options included in this RFQ/RFP. All information presented in the Sellers quote/proposal will be considered during RTI’s evaluation. Failure to submit the information required in this RFQ/RFP may result in Seller’s offer being deemed non-responsive. Sellers are responsible for submitting offers, and any modifications, revisions, or withdrawals, so as to reach RTI’s office designated in the RFQ/RFP by the time and date specified in the RFQ/RFP. Any offer, modification, revision, or withdrawal of an offer received at the RTI office designated in the RFQ/RFP after the exact time specified for receipt of offers is “late” and may not be considered at the discretion of the RTI Procurement Officer. The Seller’s proposal shall include the following:
 - (a) The solicitation number:
 - (b) The date and time submitted:
 - (c) The name, address, and telephone number of the seller (bidder) and authorized signature of same:
 - (d) Validity period of Quote:

- (e) A technical description of the items being offered in sufficient detail to evaluate compliance with the requirements in the solicitation. This may include product literature, or other documents, if necessary.
 - (f) If RTI informs Seller that the Commodity is intended for export and the Commodity is not classified for export under Export Classification Control Number (ECCN) “EAR99” of the U.S. Department of Commerce Export Administration Regulations (EAR), then Seller must provide RTI the correct ECCN and the name of Seller’s representative responsible for Trade Compliance who can confirm the export classification.
 - (g) Lead Time Availability of the Commodity/Service.
 - (h) Terms of warranty describing what and how the warranties will be serviced.
 - (i) Special pricing instructions: Price and any discount terms or special requirements or terms (special note: pricing must include guaranteed firm fixed prices for items requested.)
 - (j) Payment address or instructions (if different from mailing address)
 - (k) Acknowledgment of solicitation amendments (if any)
 - (l) Past performance information, when included as an evaluation factor, to include recent and relevant contracts for the same or similar items and other references (including points of contact with telephone numbers, and other relevant information)
 - (m) **Special Note:** *The Seller, by his response to this RFQ/RFP and accompanying signatures, confirms that the terms and conditions associated with this RFQ/RFP document have been agreed to and all of its attachments have been carefully read and understood and all related questions answered.*
4. **Forms:** Sellers (potential bidders or suppliers) must record their pricing utilizing the format found on Attachment “A”. Sellers must sign the single hardcopy submitted and send to address listed on the cover page of this RFQ/RFP.
5. **Questions Concerning the Procurement.** All questions regarding this RFQ/RFP to be directed to

Jan Ranizen F. Vitán, Procurement and Contracts Manager

(insert name of procurement officer)

at this email address:

jvitan@energysecure.ph; yatienza@energysecure.ph

(insert email address of the procurement officer).

The cut-off date for questions is *(insert date)*.

September 7, 2026 5:00PM Philippine Standard Time

6. **Notifications and Deliveries:** Time is of the essence for this procurement. Seller shall deliver the items or services no later than the dates set forth in the contract that will be agreed by both parties as a result of this RFQ/RFP. The Seller shall immediately contact the Buyer's Procurement Officer if the specifications, availability, or the delivery schedule(s) changes. Exceptional delays will result in financial penalties being imposed of Seller.
7. **Documentation:** The following documents will be required for payment for each item:
 - (a) A detailed invoice listing Purchase Order Number, Bank information with wiring instructions (when applicable)
 - (b) Packing List
 - (c) All relevant product/service documentation (manuals, warranty doc, certificate of analysis, etc.)
8. **Payment Terms:** Refer to RTI purchase order terms and conditions found in https://www.rti.org/sites/default/files/rti-po-terms_v1.21.pdf, http://www.rti.org/files/PO_FAR_Clauses.pdf, or http://www.rti.org/files/PO_FAR_Clauses_Commercial_Items.pdf. Payment can be made via wire transfer or other acceptable form. Sellers may propose alternative payment terms and they will be considered in the evaluation process.
9. **Alternative Proposals:** Sellers are permitted to offer "alternatives" should they not be able to meet the listed requirements. Any alternative proposals shall still satisfy the minimum requirements set forth in Attachment A Specifications.
10. **Inspection Process:** Each item shall be inspected prior to final acceptance of the item. All significant discrepancies, shortages, and/or faults must be satisfactorily corrected and satisfactorily documented prior to delivery and release of payment.
11. **Evaluation and Award Process:** The RTI Procurement Officer will award an agreement contract resulting from this solicitation to the responsible Seller (bidder) whose offer conforms to the RFQ/RFP will be most advantageous to RTI, price and other factors considered. The award will be made to the Seller representing the **best value** to the project and to RTI. For the purpose of this RFQ/RFP, price, delivery, technical and past performance are of equal importance for the purposes of evaluating and selecting the "best value" awardee. RTI intends to evaluate offers and award an Agreement without discussions with Sellers. Therefore, the Seller's initial offer should contain the Seller's best terms from a price and technical standpoint. However, RTI reserves the right to conduct discussions if later determined by the RTI Procurement Officer to be necessary.

The evaluation factors will be comprised of the following criteria:

- (a) **PRICE**. Lowest/reasonable evaluated ceiling price (inclusive of option quantities).
- (b) **DELIVERY**. Seller provides the most advantageous delivery schedule.
- (c) **TECHNICAL**. Items/Services shall satisfy or exceed the specifications described in RFQ/RFP Attachment A.

(d) **PAST PERFORMANCE** - Seller can demonstrate his/her capability and resources to provide the items/services requested in this solicitation in a timely and responsive manner.

(e) **OTHER EVALUATION CRITERIA.**

N/A

12. **Award Notice.** A written notice of award or acceptance of an offer, mailed or otherwise furnished to the successful supplier within the time acceptance specified in the offer, shall result in a binding contract without further action by either party.
13. **Validity of Offer.** This RFP in no way obligates RTI to make an award, nor does it commit RTI to pay any costs incurred by the Seller in the preparation and submission of a proposal or amendments to a proposal. Your proposal shall be considered valid for 60 days after submission.
14. **Representations and Certifications.** Winning suppliers under a US Federal Contract are required to complete and sign as part of your offer RTI Representations and Certifications for values over \$10,000.
15. **Certification.** The offeror, by signing its offer, hereby certifies to the best of its knowledge and belief that no Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress on its behalf in connection with the awarding of this contract.
16. **Anti- Kick Back Act of 1986.** Anti-Kickback Act of 1986 as referenced in FAR 52.203-7 is hereby incorporated into this Request for Proposal as a condition of acceptance. If you have reasonable grounds to believe that a violation, as described in Paragraph (b) of FAR 52.203-7 may have occurred, you should report this suspected violation to the RTI's Ethics Hotline at 1-877-212-7220 or by sending an e-mail to ethics@rti.org. You may report a suspected violation anonymously.
17. **The John S. McCain National Defense Authorization Act for fiscal year 2019 - section 889.** RTI cannot use any equipment or services from specific companies, or their subsidiaries and affiliates, including Huawei Technologies Company, ZTE Corporation, Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, and Dahua Technology Company ("Covered Technology"). In response to this request for proposal, please do not provide a quote which includes any Covered Technology. Any quote which includes Covered Technology will be deemed non-responsive. Additionally, if the United States Government is the source of funds for this RFP, the resulting Supplier shall not provide any equipment, system, or service that uses Covered Technology as a substantial or essential component



3040 Cornwallis Road ■ PO Box 12194 ■ Research Triangle Park, NC 27709-2194 ■ USA
Telephone 919.541.6000 ■ Fax 919.541.5985 ■ www.rti.org

Acceptance:

Seller agrees, as evidenced by signature below, that the seller's completed and signed solicitation, seller's proposal including all required submissions and the negotiated terms contained herein constitute the entire agreement for the services described herein.

By: *(Seller Company Name)*

Signature: _____

Title:

Date:

ANNEX A

Detailed Functional and Technical Specifications – ESCO Certification and Expanded Solar PV Installer Registry Modules of the Energy Efficiency Portal for Applications and Registrations (EPAR) System

The module shall, at minimum, provide the following functionalities. This list constitutes the minimum and mandatory scope of development; the SP may propose additional features that enhance usability, security, or efficiency, subject to DOE's written approval, but shall not omit, substitute, or reduce any of the following without DOE's prior written approval through a Change Request.

Item 1 – ESCO Certification Module

ESCO Registration, Certification, and Classification

- a. Online registration, certification, renewal, and upgrading of ESCOs;
- b. Digital submission and validation of requirements;
- c. Service scope registration and classification management;
- d. Technical and financial capability assessment workflows;
- e. Certificate issuance and validity monitoring;
- f. Automated notifications and renewal alerts;
- g. Registry of ESCO personnel and their qualifications.

Project and Contract Management

- a. Centralized ESCO project registry;
- b. Registration of energy efficiency and energy service projects;
- c. Contract and agreement repository;
- d. Project lifecycle and implementation tracking;
- e. Project investment and performance records;
- f. Partnership and consortium management;
- g. Project documentation and evidence repository.

Reporting, Monitoring, and Verification

- a. Online Annual Performance and Accomplishment Report (APAR) submission;
- b. Standardized reporting templates;
- c. Monitoring and verification workflow management;
- d. Inspection scheduling and tracking;
- e. Findings and corrective action monitoring;
- f. Historical reporting and performance records;
- g. Automated reporting reminders and notifications.

Compliance and Financial Administration

- a. Compliance monitoring dashboard;
- b. Tracking of regulatory obligations and deadlines;
- c. Violation and enforcement monitoring;
- d. Compliance analytics.

Public Registry and Decision Support

- a. Public ESCO directory and verification portal;
- b. Searchable registry of recognized ESCOs;
- c. Industry and project performance dashboards;
- d. Compliance and market analytics;

- e. Regional and sectoral reporting;
- f. Executive management dashboards;
- g. Automated generation of reports and statistics.

Item 2 – Expanded Solar PV Installer Registry Module

Installer Registration and Registry Management

- a. Online registration, renewal, and amendment;
- b. Digital submission of requirements;
- c. Installer profiling and categorization;
- d. Registration validity tracking;
- e. Public installer registry and verification portal;
- f. Automated notifications and alerts.

Project Reporting and Installation Records

- a. Installation/project registry;
- b. Annual project reporting;
- c. Installation record management;
- d. Product traceability records;
- e. Project document repository;
- f. Monitoring and inspection scheduling.

Compliance and Enforcement Management

- a. Compliance monitoring dashboard;
- b. Obligation tracking;
- c. Complaint and incident management;
- d. Violation management;
- e. Suspension, delisting, and reinstatement workflows.

Product Documentation and Inter-Agency Coordination

- a. Product conformity documentation repository;
- b. Equipment and product traceability.

Analytics, Public Information, and System Administration

- a. Executive dashboards;
- b. Installer and deployment statistics;
- c. Compliance analytics;
- d. Regional and sectoral reporting;
- e. Public information portal;
- f. User administration and reporting tools.

ANNEX B

Defect/Issue Severity Classification and Resolution Service Levels

This Annex sets out the classification of defects/issues identified during Testing (Phase 3) and User Acceptance Testing (Phase 4), and the corresponding minimum resolution service levels. Non-compliance with these service levels shall be treated as non-compliance with the Acceptance Criteria in the Scope of Work.

Table B-1. Severity Level Classification

Severity Level	Description	Illustrative Example (not exclusive)
1 – Critical	Issues that compromise the data security and integrity of the module (data theft/loss/alteration) and/or prevent users' access to the module.	Cyber-attacks; loss/corruption of registration or compliance data; complete unavailability of the module.
2 – High	Issues that lead to the inability to process key module actions (e.g., registration, submission, approval/evaluation) at any part of the process.	Application/registration submission, approval, or certification issuance disabled.
3 – Medium	Errors that cause confusion for users, increase difficulty of operation, or require workarounds, but do not pose risks as high as Priority 1 or 2.	Very slow response; problems with auto-generated files/certificates; inability to upload or download files.
4 – Low	Minimum-risk errors with no direct effect on normal functionality or user experience, but which should still be corrected.	Text/spelling errors, incorrect font/style, minor aesthetic issues, incorrect display values.

Table B-2. Mean Time to Resolution

Severity Level	Mean Time to Resolution
1 – Critical	Maximum of four (4) hours from notification
2 – High	Maximum of eight (8) hours from notification
3 – Medium	Maximum of forty-eight (48) hours from notification
4 – Low	Maximum of seventy-two (72) hours from notification

First Response Time: at most thirty (30) minutes from the time a defect/issue is reported through the agreed communication/ticketing channel. Incident Reopen Rate: at most twenty percent (20%) of resolved incidents may be reopened due to incomplete resolution or recurrence; a rate above this threshold shall constitute non-compliance with this Annex.

ANNEX C

Minimum Infrastructure and Hosting Specifications – EPAR System

The SP shall procure, configure, and maintain, for the duration of the engagement, infrastructure meeting at least the following minimum specifications, unless DOE expressly agrees in writing to provide any of the following:

No.	Item	Detailed Specifications
1	Staging Server	Cloud server capable of handling staging/development requirements, isolated from the production environment
2	Production Server	Minimum Specifications: Cloud Server for Application — OS platform: Linux/Unix; CPU: 16-core; RAM: 16 GB; Storage: 500 GB (expandable as needed within the contract duration) Cloud Server for Database — CPU: 16-core; RAM: 16 GB; Storage: 500 GB (expandable as needed within the contract duration)
3	Email Service Provider	Capable of sending at least 1,000 emails per month, for system notifications and alerts
4	Bot/Spam Protection (e.g., reCAPTCHA)	Protection for at least 10,000 assessments per month
5	Backup and Recovery	Automated backup and restoration management tool using full and incremental methods, with weekly full backups and quarterly restoration testing
6	SSL/TLS Certificate	Valid SSL/TLS certificate for the production domain for the entire duration of the engagement

ANNEX D**Required Workshops and Trainings**

Workshop/Training	Venue/Mode	Number of Days	Number of Participants
Clarificatory Meeting(s)	DOE / face-to-face	2 days	20
User Experience (UX) Workshop	DOE / face-to-face	1 day	20
User Acceptance Testing (UAT) Workshop	DOE / face-to-face	3 days	20
End-User Training	DOE / face-to-face	2 days	20
Administrator Training	DOE / face-to-face	1 day	20

The SP shall provide the meals and training materials for all workshops and trainings above, at no additional cost to DOE. The SP may propose and conduct additional workshops or clarificatory meetings, as may reasonably be necessary to complete the engagement, likewise at no additional cost to DOE.