**Ministry of Energy of the Kyrgyz Republic**

**Project Management Office**

**Terms of Reference (ToR)**

**to conduct a comprehensive survey, including: development and implementation of sample polls and their analysis to assess customer satisfaction with the quality of electricity supply under subcomponent 4.1. ‘Institutional Development’ of the project ’Kyrgyz Electricity Modernisation and Sustainability’**

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| **I.Background**  “Kyrgyz Electricity Modernisation and Sustainability” (KEMS) is implemented by the Ministry of Energy of the Kyrgyz Republic in accordance with the Financing Agreement between the Kyrgyz Republic and the International Development Association and is aimed at improving the financial performance and operational reliability of the electricity sector. |

The project is aimed at improving the operational efficiency and reliability of the electricity sector in a multidimensional way: proven methods to reduce losses through advanced metering infrastructure, modernisation of the distribution network and its operations, implementation of digital tools for operations and commercial activities. Financial performance is expected to improve while following the tariff trajectory towards cost recovery and efficiency in service provision, and institutional performance is expected to improve through capacity building at the sector and company level.

Under the KEMS project it is planned to determine the level of customer satisfaction with electricity, monopoly distribution of which is carried out by NEGK. This study will make it possible to assess the quality of services provided by the only operator in the market.

“National Electricity Grid of Kyrgyzstan” OJSC (OJSC NEGK) is a power company that transports and distributes electricity generated by power plants throughout the Kyrgyz Republic to residential, large industrial and other customers. Also “National Electricity Grid of Kyrgyzstan” OJSC is a system operator, which carries out centralized operational and dispatch management of the national power system of the Republic.

“National Electricity Grid of Kygryzstan” OJSC was esteblished on December 25, 2001 as a result of reorganization of “Kyrgyzenergo” JSC. In 2022, four distribution companies - Severelectro, Vostokelectro, Oshelectro and Jalalabadelectro - joined the “National Electricity Grid of Kyrgyzstan” OJSC.

“National Electricity Grid of Kyrgyzstan” OJSC has the following branches: Bishkek Electrical Netowrks Enterprise, Batken Electrical Netowrks Enterprise, Jalal-Abad Electrical Netowrks Enterprise, Issyk-Kul Electrical Netowrks Enterprise, Naryn Electrical Netowrks Enterprise, Osh Electrical Netowrks Enterprise, Talas Electrical Netowrks Enterprise, Chui Electrical Netowrks Enterprise and Training Center.

As of March 1, 2025, the number of customers of NEG of Kyrgyzstan is 1,589,213 (residential - 1,476,276, non-residential - 112,937) customers.

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| --- | --- | --- | --- | --- | --- | --- | --- |
| **No.** | **Description** | **Total** | **Residential** | **Indust.** | **Budget** | **Agricult.** | **Other** |
| 1 | ChUi ENE | 284 052 | 268 299 | 1 815 | 528 | 1 341 | 12 069 |
| 2 | Bishkek ENE | 299 312 | 277 721 | 3 307 | 382 | 137 | 17 765 |
| 3 | Talas ENE | 55 187 | 52 259 | 219 | 273 | 65 | 2 371 |
| 4 | Issyk-Kul ENE | 130 989 | 121 375 | 711 | 469 | 397 | 8 037 |
| 5 | Naryn ENE | 66 047 | 61 264 | 653 | 349 | 10 | 3 771 |
| 6 | Osh ENE | 367 028 | 338 903 | 2 351 | 668 | 1 532 | 23 574 |
| 7 | Batken ENE | 126 077 | 116 934 | 761 | 393 | 792 | 7 197 |
| 8 | Zhalal-Abad ENE | 260 521 | 239 521 | 547 | 747 | 637 | 19 069 |
| **Total for branches of NEGK** | | 1 589 213 | 1 476 276 | 10 364 | 3 809 | 4 911 | 93 853 |

In 2025, 58,417 low-income (vulnerable) families will be charged at the “Ui-bulogo komok” tariff (hereinafter referred to as “UBK”):

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| --- | --- | --- |
| Item | **Description of ENE** | **No. of custimers,**  **“Ui-bulogo komok” tariff** |
| 1 | Talas ENE | 2 356 |
| 2 | ChUi ENE | 863 |
| 3 | Bishkek ENE | 379 |
| 4 | Osh ENE | 21 219 |
| 5 | Zhalal-Abad ENE | 17 925 |
| 6 | Batken ENE | 9 929 |
| 7 | Issyk-Kul ENE | 2 774 |
| 8 | Naryn ENE | 2 972 |
| **Total for NES of Kyrgyzstan” OJSC** | | **58 417** |

1. **Objectives and tasks of survey**

The objective of this Terms of Reference is to recruit a consulting firm to conduct an initial, interim and post-project survey to determine customer satisfaction with the quality of power supply to each ENE service area and to identify problematic aspects for future service improvement. The consulting firm engaged for the work will be responsible for designing and conducting the baseline/initial survey. In case the Ministry of Energy of the Kyrgyz Republic remains satisfied with the quality of services provided, the same company will be engaged to conduct the second and third surveys to ensure continuity and consistency in the process.

The initial (Baseline) survey aims to determine current perceptions of the quality of electricity supply, identify key issues and establish a baseline level of satisfaction.

The Interim (Mid-term) survey aims to assess changes in satisfaction after the start of implementation of the electricity supply improvement measures.

The final (completing) survey is aimed at final assessment of customer satisfaction after completion of all works/activities and implementation of improvements in accordance with the project components.

1. **Survey object and sampling**

The objects of the survey are the following categories of customers of the Kyrgyz Republic. To optimize the work it is proposed to divide customers into 7 categories:

1. Population (up to 700 kWh / over 700 kWh);
2. Social and public customers;
3. Industrial customers;
4. Commercial customers;
5. Budget customers;
6. Electricity-intensive industrial consumers;
7. Car charging stations.

It is proposed to conduct survey on the service area of eight branches of the distribution company “NEG of Kyrgyzstan”.

To ensure the representativeness of the sampling, it is proposed to take the number of electricity consumers by region, including vulnerable households covered by the tariff program “Ui-bulogo komok” as the general population, with an acceptable error of ±5% and a confidence level of 95%.

It is important for the Consultant to consider all 7 categories of customers in the master sample, with a proportional share corresponding to the number of customers in each region, including beneficiaries of the UBK program.

It is also necessary to include in the master sample of customers by type of category both urban and rural areas, taking into account the characteristics of the area.

1. **Scope of work**

Three surveys are envisioned for the KEMS project: initial, interim (mid-term) and final (completing) surveys.

The survey should cover all aspects of electricity supply services provided by the distribution company NEG of Kyrgyzstan. Electricity services can be roughly divided into the following categories: (i) reliability of electricity supply, (ii) quality of service, (iii) pricing and tariffs, (iv) customer service, including commercial issues (An indicative list by key categories of issues is given in Annex 1).

In addition, the survey should provide demographic and socio-economic information about electricity consumers.

Draft and final questions and questionnaires for the baseline, interim and final survey are subject to coordination with the Executive Agency and NEG of Kyrgyzstan.

The Consultant engaged to provide services for the survey and recommendations will prepare and coordinate with the MoE of the Kyrgyz Republic, the NEG of Kyrgyzstan and the World Bank PMO:

* Questionnaires/inquiry for the survey of all categories of customers, including the extremely poor (poor families receiving UBK allowance who already have electricity benefits, and poor families who have social passports for poor families but are not covered by electricity benefits);
* Methodology for forming a regionally representative sampling of consumers based on the category of electricity consumers, as well as a representative sampling of households receiving UBK in each region;
* Work schedule, methodology and tools for survey;
* Draft reports and analytical reports of three surveys;
* Analysis of customer satisfaction with the quality of electricity supply;
* Will make presentations on the results of the survey (to the PMO as well as to other stakeholders);
* Perform other work related to improving the effectiveness of the survey being conducted if necessary;
* Prepare and submit to the MoE of the Kyrgyz Republic and the World Bank PMO reports on the activities carried out.

1. **Form of implementation**

The Consultant shall independently select the survey format based on the objectives of the survey and the target audience. Acceptable options include: face-to-face survey, telephone interviews, online questionnaires, mailings, field surveys, interviewing and mixed methods.

In order to ensure high quality of data through face-to-face interaction, the possibility to clarify unclear questions and coverage of the population in rural and hard-to-reach regions of Kyrgyzstan, as well as to ensure data quality control, questionnaire calibration and validation of the results of remote questions, the Consultant should consider the percentage of face-to-face interviews in the sample for Bishkek city and Talas oblast. Below is presented in more detail:

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| --- | --- | --- |
| Region | Settlement type | In- face-to-face survey in % of total number of respondents |
| Bishkek | City | 20% |
| Talas | Village | 60% |

When traveling to the regions, all anticipated expenses (lodging, meals, travel) as well as survey and questionnaire costs should be included in the financial proposal of the engaged Consultant.

1. **Expected deliverables**

* Draft report for coordination with the Ministry of Energy of the Kyrgyz Republic;
* Analytical report on the results of the survey with recommendations;
* Presentation of the study results to the Ministry of Energy of the Kyrgyz Republic and the World Bank's PMO of MoE KR;
* Respondents' database in MS Excel format (full database of all surveyed beneficiaries with processed statistical data, training of the staff of the PMO of the MoE KR to receive information from the database formed as a result of the survey).

**VII. Schedule for submission of key deliverables from the date of contract signing:**

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| --- | --- | --- |
| **Steps** | **Timelines** | **Remark** |
| **Baseline (Initial survey)** | | |
| Providing an Inception Report with the design/methodology for the baseline customer satisfaction survey (including a set of questionnaires and sampling method, work plan) | Two weeks after signing the contract |  |
| Conducting a baseline survey on the territory of the Republic | Within 2 months after signing the contract |  |
| Submission of draft baseline survey completion report | Three months after signing the contract | To be approved by the Executing Agency |
| Submission of baseline survey completion Report | Four months after signing the contract |  |
| Presentation and submission of all documents and information, including electronic media (Reports, recommendations, presentations, complete database of all surveyed beneficiaries with processed statistical data, training of the staff of the PMO of the MoE of the KR to receive information from the database formed as a result of the survey). | Four months after signing the contract |  |
| **Interim survey** | | |
| Submission of the Survey Design, methodology for the interim customer satisfaction survey (including a set of questionnaires and sampling method) | Within 2 weeks of receipt of the notification letter | The Executing Agency will send a notification letter to the consultant that the project activities are 50% complete and an Interim Survey is required |
| Conducting a poll on the territory of the Republic | Within 2 months of receipt of the notification letter |  |
| Submission of draft interim survey completion Report | Within 3 months of receipt of the notification letter | To be approved by the Executing Agency |
| Submission of interim survey completion Report | Within 4 months of receipt of the notification letter |  |
| Presentation and submission of all documents and information, including electronic media (Reports, graphs, recommendations, presentations, full database of all surveyed beneficiaries with processed statistical data, training of the staff of the PMO of the MoE of the KR to receive information from the database formed as a result of the survey). | Within 4 months of receipt of the notification letter |  |
| **Post-project survey (final)** | | |
| Submission of the Survey Design, methodology for the Final Customer Satisfaction Survey (including a set of questionnaires and sampling method) | Within 2 weeks of receipt of the notification letter | The Executing Agency will send a notification letter to the consultant that the project activities are 100% complete and a Final Survey is required |
| Conducting a poll on the territory of the Republic | Within 2.5 months of receipt of the notification letter |  |
| Submission of draft Final Survey Completion Report | Within 3 months of receipt of the notification letter | To be approved by the Executing Agency |
| Submission of Final Survey Completion Report | Within 4 months of receipt of the notification letter |  |
| Presentation and submission of all documents and information, including electronic media (Reports, graphs, recommendations, presentations, full database of all surveyed beneficiaries with processed statistical data, training of the staff of the PMO of the MoE of the KR to receive information from the database formed as a result of the survey). | Within 4 months of receipt of the notification letter |  |

**VIII. Requirements for content of reports**

Survey reports (baseline, interim, final) with appendices should be carefully checked and edited, presented on paper in hard plastic binding and on electronic media (MS Word, in the state, official and English languages).

Presentations reflecting the results of the conducted surveys should be provided in the state, official and English languages.

The database of respondents' answers obtained during the survey should be provided in MS Excel on an electronic medium, including formulas for reproducing the results.

**IX. Interaction mechanisms**

The engaged Consultant will work under the supervision of the Deputy Minister of Energy of the Kyrgyz Republic and the PMO consultants of the World Bank's Kyrgyz Electricity Modernisation and Sustainability Project.

**X. Reporting**

Upon completion of the work, the engaged Consultant shall submit a final report and other documents specified in the deliverables demonstrating satisfactory completion of the assignment to the MoE for review and approval.

**XI. Payment schedule**

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| --- | --- | --- | --- |
| **No.** | **Deliverable** | **Payment terms** | **Payment/weight of total contract amount in %** |
| 1 | Submission of the Initial (baseline) survey report  (please, refer to Section VI. Expected Deliverables) | Within 3 weeks after approval | **30%** |
| 2 | Submission of the Interim Survey Report  (please, refer to Section VI. Expected Deliverables) | Within 3 weeks after approval | **30%** |
| 3 | Submission of the Final Report (Completion) Survey (Final Report)  (please, refer to Section VI. Expected Deliverables) | Within 3 weeks after approval | **40%** |

**XII. Qualification requirements**

To be selected, the Consultant shall meet the following minimum qualifications:

- proven experience in development and conducting social surveys and assessments: at least 3 surveys conducted in the Kyrgyz Republic.;

- Experience in conducting surveys using methods and programmes for statistical analysis of data and availability of technical capacity for data processing (availability of tablets, laptops, necessary equipment and software for processing the data set);

The Consultant's team shall consist of a minimum of a team leader and two specialists.

Evaluation criteria for Key personnel:

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| --- | --- | --- | --- |
| **К** | **Personnel** | **General qualification and experience** | **Specific experience** |
| **11** | Team Leader, Manager | Higher education in social sciences: sociology, economics, statistics, or any other related field. 3-5 years of work experience in power engineering, sociology, economics, statistics, or any other related field | At least 2 years of work on social survey |
| **22** | 2 Analysts | Higher education in social sciences: sociology, economics, statistics, or any other related field. At least 2 years of work experience in sociology/statistics/economics | Experience with statistical analysis of data |

The engaged Consultant, in order to improve the quality and speed of its work, may, on a sub-contract basis, engage specialists with experience and qualifications in conducting surveys to carry out the assignment. The employed Consultant will be solely responsible for the entire scope, quality and timeliness of the work performed.

Appendix 1

**Indicative list by key categories of issues\***

**Section 1: Overall assessment of customer satisfaction.**

The objective of this section is to get a brief overview of respondents' satisfaction, including customers belonging to the poor, who are the most vulnerable to electricity tariff increases.

## *****1. Reliability of power supply*****

Assessment of stability and continuity of power supply:

* How often do you have power outages?
* How quickly power is restored after failure?
* How satisfied are you with the stability of the network voltage?

***2. Quality of service***

Perception of the energy company's performance and customer support:

* How polite and competent are the employees when contacting you?
* Are you satisfied with the speed of processing applications (connection, grievances)?
* Is it easy to get through to the support service?
* How long on average does it take to connect, disconnect or reconnect electricity after submitting an application?
* Are power outages in your neighborhood notified in advance?

## *****3. Pricing and tariffs*****

Perception of electricity costs and tariff transparency:

* Do you consider the tariffs to be fair?
* Is the system of charges in bills sufficiently clear??

## *****4. Customer service*****

Evaluation of modern payment services (personal account, mobile applications):

* Are you comfortable using the mobile application of NEG of Kyrgyzstan?
* Are the functions in the online service (payment, providing readings) sufficient?
* Have you ever had technical problems with meters?
* Have you ever been billed incorrectly?

**Section 2: Demographic and socio-economic information on Customers**

Demographic questions are important for analyzing survey results by segment and sub-segments of the customer population. They also, taken together, provide an understanding of what the customer body as a whole looks like and whether services are benefiting the most vulnerable customers living in the service's coverage area. These include questions about geography/location, occupation, gender, age, and income range (e.g., lead ranking) and education level.

In addition to these questions, the company provides the following information about each respondent:

- type of electricity customer;

- average amount of payment for electricity of each respondent - customer;

- availability/unavailability of benefits when paying for electricity (e.g.: UBK).

**\* This list of questions is provided as an indicative example to assist in understanding and structuring the categories of questions. The Consultant should develop a detailed list of questions for each category taking into account the objectives of the survey and submit it for approval to the PMO of the Ministry of Energy of the Kyrgyz Republic.**