|  |  |
| --- | --- |
| **Project title:**    **Country:**    **Subject of the tender procedure:** | **Processing number/ cost centre:**    **Transaction number:** |

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# List of abbreviations

# EVB‑IT Supplementary Terms and Conditions for the Procurement of IT Services

Appropriate plans and preparations need to be made in order to implement an IT project and procure an IT solution. You can find a toolkit providing guidance on IT project management on the Digital Gateway at: [Toolkit for IT Project Management - Orientation for IT Implementations (sharepoint.com)](https://gizonline.sharepoint.com/sites/Digital-Gateway/SitePages/Toolkit-for-IT-Project-Management---Orientation-for-IT-Implementations.aspx).

It is also necessary to involve the Sectoral Department when preparing and implementing tenders for IT services above the EU threshold. The Sectoral Department must be commissioned via Internal Customer Services at <https://gizonline.sharepoint.com/sites/beezy/groups/1260/SitePages/Units/en-us/Home.aspx>.

*This template for terms of reference is designed for use in tender procedures for specific IT services that are to be provided as part of a cost unit-financed project. It is intended to be employed in tender procedures for IT services such as: (further) development of custom software or websites, apps, M&E tools, databases or other digital applications, commissioning of IT consultancy/development services, customisation, including maintenance, servicing or support services, training or hosting.*

This standard template is **not** suitable for **purchasing or leasing** new standard software, including customisation of standard software, or the procurement of **software‑as‑a‑service solutions/licences.**

The Supplementary Terms and Conditions for the Procurement of IT Services (EVB-IT) are typically used as specimen contracts for IT services. This set of specimen contracts is developed specifically for the public sector, with the process coordinated by a working group from the German Federal Ministry of the Interior and Community (BMI).

An **EVB-IT services contract** (EVB-IT Dienstleistung) is often used as the contractual basis for IT services. This contract generally provides for monthly billing, the granting of simple rights of use, and the right of termination solely for good cause. However, different arrangements can be made (quarterly billing, advance payment with a payment plan, the affording of exclusive rights of use, termination right, etc.).

If a custom software application is to be developed or refined, giving rise to a **work** that is ready for acceptance, then it is necessary to conclude an **EVB-IT development contract** (EVB-IT Erstellung) **or an EVB-IT system contract** (EVB-IT System)**.** If a work is tendered, however, the requirements for the IT solution in the Terms of Reference must be described in a sufficiently specific and detailed manner for it to be possible for the **work or parts thereof** **to be accepted.**

This template contains standard text modules in black. Using them is optional and they can be adapted as required. Text fields must be completed. Information and suggestions are shown in orange.

# Context

## 1.1 The company

## Project background

## Objective of the commission/subject of the procurement

*An introductory overview should be provided here of the subject of the procurement, e.g. the services to be provided (the objective of the IT solution itself is specified in section 2.2 below).*

# Requirements for the IT solution

*The specific requirements for service provision must be described in section 2. As an alternative to a description of the requirements for the IT solution, or to supplement the description, they can be presented in the form of a list of criteria. This list provides a description of the tendered service and enables tenders to be evaluated as part of the tendering procedure.*

## 2.1 Description of the existing IT solution

*Please provide the tenderers with all the information about the existing IT solution here. This is necessary if an existing solution is to be replaced or developed further. The existing IT solution must have been specified. Contact your current service provider if applicable.*

*The following information/documents could conceivably be provided:*

* *Software stack and dependencies*
* *System requirements, system specifications and system architecture*
* *Diagrams and outlines (e.g. use case, ERD, process outlines, mock‑ups)*
* *Annotated source code*
* *Other technical documentation (e.g. interfaces, (clearance of) faults)*
* *Administration and user manual*
* *Statistics (e.g. access figures, server load)*

## 2.2 Description of the application/use of the IT solution

*Detailed information should be provided at this point regarding the application/use of the IT solution, e.g.*

* *What problem is the IT solution intended to address?*
* *What is the objective of the IT solution?*
* *Who is the target group (smartphone and internet access, age, employment, social status, motivation to use the app, language skills, literacy)?*
* *Which indicators does the IT solution help to achieve?*

## 2.3 General conditions at the partner end *(where relevant)*

*If the software to be developed is taken on by the partner or another organisation after it is completed or once the contractual term has ended, then the general conditions and capacity of the partner should be described here. These may present further requirements for the software.*

* *Does the partner organisation have an IT department? How many people work there?*
* *What are the likely training needs? (More on this topic in section 3)*
* *What technical and organisational prerequisites does the partner organisation fulfil?*
* *If the IT solution is developed for and with the political partner, in the interests of sustainable capacity development you should give consideration to allowing IT experts at the partner organisation to participate in the development. This would need to be taken into consideration in work package 3.*

## 2.4 Functional requirements

*Specific requirements for the IT solution must be described here. Functional requirements can be described from the user perspective through user stories (answers the question ‘Who wants what and for what purpose?’) or as a direct description of the functions of the IT solution (answers the question of ‘what’ should be achieved, as well as ‘how’ it should be implemented). The goal is to give potential service providers as comprehensive an impression as possible of the IT solution to be developed. This also provides them with a basis for calculating the number of expert days required.*

*The requirements are the result of a prior planning and analysis phase. If these requirements are not yet in place, then please follows the steps in the* [Toolkit for IT Project Management in the Context of German Development Cooperation (sharepoint.com)](https://gizonline.sharepoint.com/sites/Digital-Gateway/SitePages/Toolkit-for-IT-Project-Management.aspx) *It is strongly advisable to call upon external appraisers or planning officers from the Sectoral Department to draw up requirements and/or provide relevant support. A two-step process is typical. This involves commissioning appraisers with conducting a requirements analysis and then a service provider with implementing the requirements.*

*You can find more information about developing requirements on the Digital Gateway at* [*Requirements Collection Elaborated (sharepoint.com)*](https://gizonline.sharepoint.com/sites/Digital-Gateway/SitePages/Collecting-Requirements-Elaborated-EN.aspx)*. The requirements can also be listed in an annex. Please include a relevant note here in this case.*

## 2.5 Non-functional requirements

The following non-functional requirements must be taken into account by the contractor when implementing the service.

## 2.5.1 Interfaces

*Any necessary interfaces must be described here. To this end, please check for each function of the IT solution whether and, if so, which data or information is required from internal or external sources. Interfaces may comprise an internal GIZ project database, the importing of Excel files or other data delivery systems. Describe here the interface, the data format and the nature and frequency of use. If the source already has an* [*application programming interface (API)*](https://en.wikipedia.org/wiki/API)*, please refer here to corresponding documentation.*

## 2.5.2 System requirements/technical framework

*Further requirements or technical frameworks for the IT solution can be described here, including:*

* *Portability (e.g. operability on mobile devices to be defined)*
* *Security (e.g. certain norms or auditing standards)*
* *Maintainability*
* *Reliability*
* *Scalability*
* *Performance*
* *Reusability*
* *Flexibility*
* *Compatibility (e.g. ‘Chrome 89 or later’)*
* *Graphic design specifications (e.g. corporate design in annex)*

## 2.6 Use of open source software (OSS)

*If open source software or OSS elements are used for the tendered IT solution, e.g. in the content management system, then account must be taken of the following aspects:*

*As a rule, Terms of Reference must be product-neutral (OSS, proprietary solutions) by nature. Consequently, any specification of the use of open source software must have an objective rationale, and be contractually justified and documented.*

*Further information on the use of open source software is provided via the following link on the Digital Gateway:* [*Open Source in IT Tenders (sharepoint.com)*](https://gizonline.sharepoint.com/sites/Digital-Gateway/SitePages/Open-Source-IT-Ausschreibungen.aspx)*.*

*Certain OSS products can only be explicitly prescribed if their use is objectively justified by the nature of the service to be tendered.*

*It is also necessary when using open source software to take account of the corresponding licensing terms. The regulations governing right of use are adapted or incorporated accordingly in the respective Supplementary Terms and Conditions for the IT agreement by the Procurement and Contracting Division.*

## 2.7 Hosting

*If the IT solution is also hosted by the contractor, then the requirements/parameters for the hosting services should be described here (web space, dedicated server, server location, server redundancy, etc.). Alternatively, you could commission hosting services separately. Hosting services with a total contractual value of up to EUR 4,000.00 can be commissioned directly by the organisational units*

[*Document overview: zustaendigkeiten-auftragserteilung-de.pdf (giz.de)*](https://dms.giz.de/dms/llisapi.dll/Open/12981506) (*German only)*.

*You can find information on hosting requirements under the following link on the Digital Gateway:* [Hosting of Websites and Web Applications (sharepoint.com)](https://gizonline.sharepoint.com/sites/Digital-Gateway/SitePages/Hosting-EN.aspx)*.*

The contractor shall provide the following hosting services:

## 2.8 Further specifications/general conditions

*Further specifications/general conditions can be described here.*

# Responsibilities of the contractor

The contractor must deliver the following services and work packages (along with the corresponding milestones). The work packages have no chronological order and can also be implemented on an integrated basis, depending on the development methodology:

*A work package comprises several activities and work results. The description, number and content of the work packages need to be adapted depending on the IT solution to be created and the client’s needs. The work packages outlined below are for* ***guidance purposes*** *only. They are shown in the sequence that they are solely to ensure that all aspects of an IT development process are incorporated and mapped in the terms of reference.*

## 3.1 Work package 1: *Kick-off*

*At the start of the project, the contractor and the client clarify the expectations for the cooperation arrangement, the technical platform for cooperation, the relevant responsibilities and the project schedule. The first meeting also allows substantive questions to be clarified regarding the issues, objectives to be defined, requirements to be established and other contextual information to be presented.*

*Services to be provided by the contractor:*

* *Documentation of the agreements*
* *Establishment of a(n) (online) work environment*

## 3.2 Work package 2: *Drafting of implementation concept*

*The implementation concept is drafted together with the contractor, the target group and any other relevant stakeholders, and includes:*

* *Development methodology, schedule and release plan*
* *Revised and prioritised functional requirements*
* *(Provisional) system architecture*
* *Depending on the methodology: description of the areas of application and system specifications or backlog, for instance with user stories*
* *Visualisations and outlines (e.g. mock-ups, user journeys, process outlines, ER and use case diagram)*

*Work results to be provided by the contractor:*

* *Implementation concept*

## 3.3 Work package 3: *Technical implementation*

*The IT solution is to be developed on the basis of the implementation concept. The methodology and the release plan specify the (iterative) publication of functions. The contractor will propose the development methodology and the provisioning model in the technical concept (see section 7).*

*Work results to be provided by the contractor:*

* *Object code and/or operable and executable application*
* *Documentation of the development process (e.g. implementation progress, changes)*
* *Annotated source code*

## 3.4 Work package 4: *Testing and quality assurance*

*The client sets up a test environment and, during and after the development process, conducts the relevant recommended tests (e.g. unit, integration, load). Tests are also conducted regularly with future users of the IT solution.*

*Work results to be provided by the contractor:*

* *Test concept and test documentation*
* *Documentation of the user feedback and the improvements (faults, weak points, exploits, etc.)*

## 3.5 Work package 5: *Documentation*

*The client must be provided with detailed documentation of the functionalities and the source code annotation in good time and in an appropriate manner. The contractor is obligated to make the latest documentation available for inspection at any time.*

*If personal data is processed,*

*then the contractor will assist the client with creating a register of processing activities.*

*Work results to be provided by the contractor:*

* *Documentation based on a conventional standard (e.g. arc42)*

*The documentation must include the following items in particular:*

* + *Software stack and dependencies*
  + *System requirements, system specifications and system architecture*
  + *Diagrams and outlines (e.g. use case, ERD, process outlines, mock‑ups)*
  + *Other technical documentation (e.g. interfaces, (clearance of) faults)*
* *Register of processing activities*

## 3.6 Work package 6: *Training*

*Training needs and the scope of the courses must be adapted to individual situations.*

## *3.6.1 Administration training*

*The contractor delivers […] days/hours of technical training in [location] for [number] of the [partner’s, organisation’s, project’s] IT personnel. Conducted in [German/English], this training enhances knowledge and capacity for sustainable operations. The training content is also documented in writing.*

## *3.6.2 User training*

*The client conducts […] days/hours of training in [location] for [number] users of the IT solution’s content. This training is conducted in [German/English] and its content is also documented in writing.*

*Work results to be provided by the contractor:*

* *Training material*
* *User manual*
* *Administrator’s manual*
* *Guidelines on editorial services*

## 3.7 Work package 7: *Support (and operation)*

*Version 1:*

*The contractor provides support for the IT solution until the end of the contractual term. This involves:*

* *1st level support:*
  + *Classifying user enquiries, analysing and clearing frequent, easily resolvable faults and disruption, forwarding to specialists and creating descriptive support tickets*
* *2nd level support:*
  + *Classifying and systematically processing enquiries from 1st level support, direct phone or written contact with users, updating the knowledge database on frequent problems or faults, forwarding unresolvable problems to 3rd level support*
* *3rd level support:*
  + *Processing enquiries concerning IT administration or operational faults or disruption, high degree of specialisation in respective software and hardware, no direct contact with end users*

*Specific response times and support classifications should be set out in the EVB-IT contract where necessary.*

*Version 2:*

*The contractor provides support and operating services until the end of the contractual term. This involves:*

* *Monitoring and updating the server applications and services*
* *Monitoring and updating the underlying (web) application, frameworks and other dependencies*
* *Bug-fixing*
* *Communicating with the hosting provider in the event of critical incidents*

*Work results to be provided by the contractor:*

* *Report on support enquiries that have been addressed*
* *Report on operational and maintenance activities*

## 3.8 Work package 8: *Project management*

*The contractor appoints an experienced project manager as a permanent contact for the entire term of service provision. The project manager will be responsible for project management on behalf of the contractor.*

*Project management involves:*

* *Compiling an overall picture of the client’s technical requirements, and breaking them down into a schedule and personnel plan.*
* *Coordinating the schedule of the individual steps with the client and documenting it in the form of a shared project plan.*
* *The contractor also produces a project/iteration plan that specifies the iteration in which specific requirements are implemented.*
* *During development, regular progress reports must be provided to the contractor.*

*Work results to be provided by the contractor:*

* *Project and iteration plan*
* *Regular progress reports*

## 3.9 Work package 9:

Other work packages can be described in the same manner.

# Schedule and milestones

*Certain milestones are scheduled for certain dates and at certain locations during the contractual term, as shown in the following table:*

|  |  |
| --- | --- |
| **Milestones** | **Delivery date/period** *(either a date or a time period, for example ‘four weeks after the start of the agreement’)* |
|  |  |
|  |  |
|  |  |
|  |  |

# Granting of rights of use (e.g. to partners)

*If third parties, such as the partner, are granted or have transferred to them rights of use while the agreement is still running or after the project is completed, then account needs to be taken of and relevant arrangements made for this during the tendering process.*

The rights of use for the IT solution, to be granted as per section 3.2 of the *Supplementary Terms of Contract for IT Services – EVB-IT Standard Business Terms for IT Services (EVB-IT-Service-AGB)* (this may need to be amended according to the type of EVB-IT contract concluded), are granted both to GIZ and to [the partner/other institution].

***Alternative:***

Following completion of the project, the rights of use for the IT solution are transferred/granted to [the partner/other institution] pursuant to section 3.2 of the *Supplementary Terms of Contract for IT Services – EVB-IT Standard Business Terms for IT Services (EVB-IT-Service-AGB)* (this may need to be amended in accordance with the type of EVB-IT contract concluded).

# Data protection and information security

*Particular consideration must be given to aspects of data protection when commissioning IT development work.*

*You can find information on which data protection requirements need to be taken into account and which text modules need to be used here:* [Data Protection in Project Implementation (sharepoint.com)](https://gizonline.sharepoint.com/sites/Digital-Gateway/SitePages/Data-Protection-in-Project-Implementation.aspx)*.*

*In case of doubt, before tender documents are submitted to the Procurement and Contracting Division it is necessary to clarify with* ***Data Protection Management*** *or the* ***Data Help Desk*** *whether personal data will be processed and whether an outsourced data processing agreement needs to be concluded. If so, then the agreement document must be filled out in advance and submitted together with the tender documents.*

# Language

*Supplementary Terms of Contract for IT Services – EVB-IT Standard Business Terms for IT Services (EVB-IT-Service-AGB) state in sections 1.2, 6.1 and 8.1 that services and documentation must be provided in German and communication with the client also be conducted in German. If any of these elements are to be carried out in another language, then alternative arrangements can be made for this here as follows:*

In deviation from sections 1.2, 6.1 and 8.1 of the*Supplementary Terms of Contract for IT Services – EVB-IT Standard Business Terms for IT Services (EVB-IT-Service-AGB)*, the services are to be provided in (please complete).

# Technical-methodological concept

In the conceptual design of the tender (technical-methodological approach, project management, if necessary other requirements), the tenderer is required to take specific objectives and requirements into consideration and describe them, as explained below.

The standard text modules in the individual sub-sections in the technical-methodological concept can be adapted to meet the corresponding requirements (including marking them ‘not applicable’). However, the sections themselves cannot be changed.

* 1. **Requirements for the technical-methodological concept (section 1 of the assessment grid)**

In the tender, the tenderer is required to show *how* the services specified in section 3, where relevant taking account of other specific methodological requirements (section 2), are to be provided (technical‑methodological concept).

## 8.1.1 Assessment of the requirements:

The tenderer must assess the objective and the requirements of the IT solution (see sections 1 and 2) in relation to feasibility and to what particular (non-)technical difficulties must be taken into account in the IT solution to be developed by the tenderer in regard to the objective (section 1.1 of the assessment grid).

## 8.1.2 Project management and development methodology:

The tenderer should consider the design of the project management process and describe his or her methodology for development/implementation, taking into account the described work packages (section 3) and compliance with the milestones (section 4) (section 1.2 of the assessment grid).

## 8.1.3 Operational plan/personnel assignment plan:

The tenderer must create and explain an operational plan that also includes a personnel assignment plan for all of the specialist staff that he or she offers. The operational plan must depict the assignment periods (time period and expert days) and, in particular, describe the necessary work steps and take account of and, where necessary, supplement the milestones as per section 4 (section 1.3 of the assessment grid).

## 8.1.4 Test and documentation concept:

The tenderer must describe the process for testing and documenting the IT solution and the IT security and documentation standards used (section 1.4 of the assessment grid).

## Additional requirements (section 2 of the assessment grid)

*Requirements which do not fit in section 7.1 can be described here. Extra lines can be added to section 1.7 of the assessment grid for this purpose.*

# Human resources

*A human resources concept comprises positions to which tasks and qualifications are assigned, covering the task descriptions from section 3 of the ToR template. The Terms of Reference indicate the ideal qualifications, for which the proposed expert is awarded 10 points in the technical assessment. If the tenderer offers less qualified experts, then he or she will be awarded fewer points. Non-relevant criteria of the Terms of Reference, which are not assessed, must be set to zero in the weighting column of the assessment grid.*

## Human resources concept

The tenderer is required to provide staff for the positions (‘experts’) referred to and described here in terms of the scope of tasks and qualifications on the basis of corresponding CVs (see section 7).

*The expert positions listed below as examples can be filled by individuals or pools of experts. The titles of the expert positions can be changed by the responsible officer. You can find a helpful overview of relevant positions/roles in the IT sector under the following UK Government link:* [*Digital, Data and Technology Profession Capability Framework - GOV.UK (www.gov.uk)*](https://www.gov.uk/government/collections/digital-data-and-technology-profession-capability-framework).

The **individual qualification categories cannot be changed**.

**No distinction is made between national, regional and international experts**.

The terms **‘at least’, ‘is assumed’, ‘desirable’, ‘is an advantage’ etc.**, must not be used for qualifications.

**Language skills** must be described in accordance with the Common European Framework of Reference for Languages (for example, C1).

The figures given in the context of the qualifications (for example, 3.1.1) correspond to the figures in the assessment grid. Please take care to only require qualifications that are related to the tendered service. **Qualifications that are not required must not be deleted. Instead they must be marked ‘– not applicable –’ and weighted with 0% in the assessment grid.**

You can use the pilot of the new **fee schedule for digitalisation and IT implementation and operation** (page 6) as a guide when determining the professional requirements for staff.

The human resources concept determines the quantitative requirements (expert days per role/pool) and thus also the price schedule, which is completed by tenderers.

The qualifications specified below meet the requirements for achieving the highest score in the technical assessment.

**Expert 1:**  **(Section 3.1 of the assessment grid)**

Qualifications:

* Education/training (3.1.1):
  + Qualification or certificates in the area of       (e.g.      )
* Language (3.1.2):
  + Knowledge of      , for example, English, C1 in the Common European Framework of Reference for Languages
* General professional experience (3.1.3):
  + years of professional experience in the area of       *(e.g.* IT project management, specific system landscapes, etc.)
* Specific professional experience (3.1.4):
  + years of professional experience in
  + years of professional experience in
* Leadership experience/management (3.1.5):
  + years of leadership experience as a project team leader or manager in a company
* Development cooperation (DC) experience (3.1.6):
  + years of experience working on DC projects
* Other (3.1.7):
  + years of experience in

**Expert pool 1 ‘     ’** *(if necessary, pool name)* **with**  **to** **experts**

**(Section 3.5 of the assessment grid)**

*The experts can be exchanged during the contractual period in consultation with the officer responsible for the commission.*

Qualifications:

* Training (3.5.1):
  + experts with certificates in
  + experts with certificates in
* Language (3.5.2):
  + experts with knowledge of      , for example, English, C1 in the Common European Framework of Reference for Languages
  + experts with knowledge of           , for example, Spanish, C2 in the Common European Framework of Reference for Languages
* General professional experience (3.5.3):
  + experts with       years of professional experience in the area of       (for example, specific IT sector or applications, positions)
  + experts with       years of professional experience in the       (for example, infrastructure) sector, of which       years on another continent (international context)
* Specific professional experience (3.5.4):
  + experts with       years of professional experience in       (specialist area)
  + experts with       years of professional experience in       (specialist area)
* Leadership experience/management (3.5.5):
  + experts with       years of leadership experience as a project team leader or manager in a company
* DC experience (3.5.6):
  + experts with       years of experience in development cooperation
* Other (3.5.7):

The tenderer must provide a clear overview of all the proposed experts and their individual qualifications.

Other experts (up to a total of 10) can be listed here using the same format. Please change the figures in the qualifications accordingly.

# Costing requirements

## Assignment of experts

In your tender, please do not deviate from the specification of quantities required in these Terms of Reference under sections XX and X (the number of experts and expert days, the budget specified in the price schedule), because this is part of the competitive tender and is used to ensure that the tenders can be compared objectively. There is no entitlement to use the total number of expert days or the specified budget.

Expert days form the basis for the calculation of the specification of quantities. Expert days are eight-hour working days.

The number of expert days corresponds to the working days.

|  |  |
| --- | --- |
| **Expert** | Expert days |
| **Expert 1:** |  |
| **Expert 2:** |  |
| **Expert 3:** |  |
| **Expert 4:** |  |
| **Expert pool 1:** |  |
| **etc.** |  |

## Travel expenses

Travel expenses must be costed as follows by the contractor:

|  |  |
| --- | --- |
| **Travel expense item** | **Number/amount** |
| Total number of international flights |  |
| Total number of regional/domestic flights |  |
| Transport costs (rail travel, car travel, public transport) |  |
| Per-diem allowances |  |
| Accommodation allowances |  |
| Other travel expenses (visa, project-related travel expenses outside the place of business, etc.) |  |

**Alternative** to individual travel expense items

Travel expense budget: EUR       *(to be completed by the responsible officer)*

As the number and duration of the business trips are not yet clear, the aforementioned fixed, unalterable travel expense budget for all trips in Germany and abroad for *all* experts (*adapt if necessary*) is specified in the price schedule. The budget includes the following travel expenses:

* Per-diem allowances and accommodation allowances
* Flights and other transport costs
* Ancillary travel expenses (visa, etc.)

*Please delete where not applicable or add information if necessary.*

The costs are reimbursed in accordance with the country table in the BMF circular on travel expense reimbursement dated 3 December 2020 (available at: <https://www.bundesfinanzministerium.de>) (German only) as a lump sum (per-diem allowances and accommodation allowances up to the highest rates under tax law for the country in question) or on submission of documentary proof (accommodation costs which exceed this up to an appropriate amount, the cost of flights and other main forms of transport). All business travel must be agreed in advance by the officer responsible for the project. Travel expenses must be kept as low as possible.

***Alternative:***

– Not applicable –

## Equipment

In the case of equipment procurement, e.g. IT equipment, servers, etc., a distinction is made between budgets below and above EUR 20,000.

***Alternative****: below EUR 20,000:*

Budget for equipment: EUR       *(to be completed by the responsible officer)*

The fixed, unalterable budget above is earmarked for the procurement of the equipment described in the table below (payment on submission of documentary proof). *(Please delete items from the table where not applicable or add information if necessary.)*

Equipment to be procured by the contractor in the financial bid:

* e.g. procurement of hardware (laptops, servers)

**Alternative**: above EUR 20,000:

The procurement of materials and equipment costing more than EUR 20,000 must be described in detail by the officer responsible for the commission and approved by the Procurement Section in advance. Please contact your procurement specialist.

**Text module** for approved procurements of materials and equipment:

The contractor procures the following equipment:       or the equipment listed in Annex 1. A fixed budget of EUR       is given in the price schedule for this. Financial settlement is effected on submission of documentary proof.

**Optional**, if sustainability aspects are to be assessed in the context of the procurement of equipment:

In section 3.7, the contractor must describe the extent to which sustainability factors will be taken into consideration in the procurement of the equipment.

***Alternative****: Costing by the tenderer:*

In the tender, the contractor undertakes to procure the equipment and includes this in the costing of the tender.

**Optional**, if sustainability aspects are to be assessed in the context of the procurement of equipment:

In section 3.7, the contractor must describe the extent to which sustainability factors will be taken into consideration in the procurement of the equipment.

(Please delete items from the table where not applicable or add information if necessary.)

***Alternative:***

– Not applicable –

## Workshops, training

The contractor runs the following workshops/training courses:



*If no details are yet available, please delete.*

Workshop budget: EUR       *(to be completed by the responsible officer)*

The fixed, unalterable budget stated above for workshops is specified in the price schedule. The budget includes the following costs relating to the planning and running of workshops:

* Room hire
* Technical systems
* Moderation services
* Translation/interpreting
* Catering
* Workshop materials
* Travel expenses for partner experts (subsistence, accommodation, travel costs)
* Other costs relating to the workshops

*Please delete where not applicable or add information if necessary.*

The budget does not include the fees and travel expenses for the contractor’s experts incurred in connection with the planning and running of the workshops. These are covered by the corresponding number of expert days and travel expenses (sections 5.4 to 5.7 and 5.9 of the financial bid).

**Alternative**: Costing by the tenderer:

The contractor is required to include the following costs relating to the planning and running of the aforementioned workshops: *(Please delete where not applicable or add information if necessary.)*

* Room hire
* Technical systems
* Moderation services
* Translation/interpreting
* Catering
* Workshop materials
* Travel expenses for partner experts (subsistence, accommodation, travel costs)
* Other costs relating to the workshops

***Alternative:***

The contractor is not responsible for the logistical organisation of the workshops and therefore the costs do not need to be specified.

***Alternative:***

– Not applicable –

## Hosting

Hosting as per section 2.5 is required for the period from       to      .

The price must be listed in the price schedule as a monthly/ ***in exceptional cases*** annual lump sum. Hosting is required for a total period of       months/ ***in exceptional cases*** years.

***Alternative:***

– Not applicable –

## Other costs

Any costs that cannot be allocated to any other budget line can be explicitly provided for under this item. It should be checked whether a budget specification against evidence could be useful.

***Alternative:***

– Not applicable –

## Flexible remuneration item

Budget for flexible remuneration: EUR       *(to be completed by the responsible officer)*

The fixed, unalterable budget stated above for flexible remuneration is earmarked in the price schedule. Flexible remuneration is intended to facilitate the flexible management of the contract by the officer responsible for the commission at GIZ. The contractor can make use of the funds in accordance with section 5.18 of the General Terms and Conditions of Contract.

A budget (up to 10% of the contractual sum and a maximum of EUR 200,000 in accordance with the settlement guidelines) can be specified here, depending on the requirements.

***Alternative:***

– Not applicable –

## Cofinancing arrangements

***Additionally, in the event of other financing bodies being involved****, e.g. a cofinancing arrangement with other donors (EU, SIDA, CIDA, DFID, etc.):*

      shall provide financial support for implementation of the overall project.

The objective of the overall project is      . Please enter the project objective from PBS, section 3.5.

The objective of the tender published is      . Please specify precisely the objective of the tender published and the associated development results.

***Alternative:***

– Not applicable –

# Requirements on the format of the tender

The structure of the tender must correspond to the structure of the ToR. It must be legible (font size 11 or larger) and clearly formulated. The language in which the tender must be written is      .

The technical-methodological concept of the tender (section 7 of the ToR) is not to exceed       *(to be completed by the responsible officer, guideline for lower limit: xxx; upper limit:)* pages (not including the cover page, list of abbreviations, table of contents and brief introduction).

The CVs of the staff proposed in accordance with section 9 of the ToR must be in the EU format and not exceed four pages in length. The CVs must clearly show what position the proposed person held, which tasks he or she performed and how many expert days he or she worked during which period in the specified references. The CVs can also be submitted in a different language, namely      .

We strongly request that you do not exceed the number of pages specified.

# Options

Only if the changes specified below can be clearly and precisely formulated. Examples of options (if necessary, change the numbering):

**Alternative: Change to contract for follow-on measure (‘follow-on contract’):**

## Follow-on measure/extension of service-delivery period

It is possible to continue key elements of the service specified in the tender as part of a follow-on measure within the context of the basic project. This is described in detail below:

**Type and scope:**      .The impact of the additional service on the tasks and the necessary human resources concept (if possible, the responsible officer should give the maximum additional specification of quantities required, see below).

**Precondition:** The contract for the follow-on phase is awarded by GIZ’s ultimate commissioning party      .

**Alternative: Change to the contract, expansion for other reasons** – must be specified by the responsible officer – for example, expansion of the measure to include additional partner countries or additional themes in the context of a modification offer in the ongoing phase.

## Expansion of the service content

GIZ’s ultimate commissioning party may adapt the service in the tender within the context of a change to the contract for the basic project. This is described in detail below:

**Type and scope:**      . *The impact of the additional service on the tasks and the necessary human resources concept (if possible, the responsible officer should give the maximum additional specification of quantities required, see below).*

**Precondition:**      .

**Alternative: Change to the contract, expansion of the content of the service by means of cofinancing:**

The service specified in the tender may be expanded within the context of a cofinancing measure that is in the planning phase. This is described in detail below:

**Type and scope:**      . The impact of the additional service on the tasks and the necessary human resources concept (if possible, the responsible officer should give the maximum additional specification of quantities required, see below).

**Precondition:** Signing of the contract to cofinance the measure by the cofinancing body       and GIZ.

**Specification of quantities for options** (to be inserted by the responsible officer in the ‘Type and scope’ section of the relevant option):

***Alternative 1***

The specification of quantities below contains estimates based on information currently available. They may need to be modified.

***Alternative 2***

Please price the specification of quantities below for optional services in your tender. Please do not deviate in your tender from the specification of quantities required in these Terms of Reference (the number of experts and expert days, the budget specified in the price schedule), because this is part of the competitive tender and is used to ensure that the tenders can be compared objectively. There is no entitlement to use the total number of expert days or the specified budget.

Expert 1: up to       expert days in total

Expert 2: up to       expert days in total

Expert 3: up to       expert days in total

Expert 4: up to       expert days in total

etc.

Travel expenses: up to EUR       *(to be completed by the responsible officer, if possible with details)*

Supplies/non-durable items: up to EUR       *(to be completed by the responsible officer, if possible with details)*

Workshops: up to EUR       *(to be completed by the responsible officer, if possible with details)*

Local subsidies: up to EUR       *(to be completed by the responsible officer)*

# Annexes (optional)

It is important to ensure that any parts of the annexes that must not be made public are removed or made illegible before being submitted to the Contract Management Section.