Terms of reference (TOR) for the procurement of a digital monitoring system (Software-as-a-Service and related services)

Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

Project title:
Support to Transitional Justice in Ethiopia

Country:
Ethiopia

Subject of the tender procured:
Digital monitoring system

Processing number / cost centre:
G-012172-001

Transaction number:
10015780

List of abbreviations

A	exclusion criterion
API	Application programming interface
AuV	Outsourcing of data processing
B	evaluation criterion
BMZ	German Federal Ministry for Economic Cooperation and Development
EU	European Union
EU GDPR	EU General Data Protection Regulation
EVB IT	Supplementary Terms of Contract for IT Services
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
M&E	Monitoring and Evaluation
MoJ	Ministry of Justice
RBM	Results-based monitoring
SaaS	Software-as-a-service
S2TJ	Support to Transitional Justice in Ethiopia
TJ	Transitional Justice
TOM	Technical and organisational measures
ToR	Terms of Reference
WoM	Results-based monitoring (German: wirkungsorientiertes Monitoring)
WP	Work package

1 Context

1.1 GIZ

The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH supports the German Government in achieving its goals in international cooperation for sustainable development and in international education work. The GIZ is involved in many fields of work, ranging from economic development and employment promotion to state and democracy building, the promotion of peace, security, reconstruction and civil conflict transformation, food security, health and basic education, and environmental, resource and climate protection.

The GIZ is active in around 120 countries worldwide, sending experts and managers on projects and programmes. A high proportion of these partner countries are characterized by fragility, violence and a risk to human security. In addition to its own employees, GIZ is also responsible for the safety of partners, experts and other stakeholders.

1.2 Project background

The “Support to Transitional Justice” project (S2TJ) in Ethiopia” is a technical cooperation project implemented by GIZ on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ). The project started in June 2024 with an inception phase that was extended to May 2025 and runs until November 2027. The objective of the project is: “state and civil society actors are in a better position to implement the peace process with regard to designing a victim-centred transitional justice (TJ) process and promoting gender justice at national, regional and local level in Ethiopia.” This includes advising and supporting existing governmental institutions in setting up new state institutions and elements in the justice system to ensure the TJ process is implemented in line with international human rights standards. The political partner of the project is the Ministry of Justice (MoJ), which is the key institution for implementing the Ethiopian Transitional Justice Policy that was adopted in April 2024.

The four output areas of the S2TJ project are:

(1) The capacities of state actors with regard to the design of a victim-centred and gender responsive TJ process have improved.

(2) The technical and organisational capacities of civil society actors have been strengthened in terms of their participation in the victim-centred and gender-responsive design of the TJ process.

(3) The technical and process-related capacities of state actors in the selected regions have been strengthened with regard to improving gender justice in the implementation of the peace process.

(4) The technical and institutional conditions needed for civil society and state actors to be able to offer psychosocial measures and measures related to dealing with the past in a gender-responsive manner for the local implementation of the peace process in the selected regions have improved.

As S2TJ is a new project, its monitoring plan and related processes have recently been developed. These processes are now to be complemented and operationalised through the purchase and introduction of a digital monitoring tool. Responsibility for monitoring lies with the S2TJ M&E coordinator, who consolidates all monitoring data, including data from large grants.

Monitoring data will serve primarily donor reporting, communication and outreach purposes and internal progress monitoring and learning.

The S2TJ primary monitoring requirements are as follows:

a) Results-based monitoring

Monitoring will be structured around results agreed with the donor and defined in the project's results matrix. Indicators include both quantitative (e.g. number of trainings conducted, beneficiaries reached) and qualitative measures (e.g. development of policy documents, communication products). In some cases, mixed indicators will be applied. The tool shall enable systematic tracking of both quantitative and qualitative indicators. For qualitative indicators, this includes milestone tracking and percentage-based progress updates.

b) Activity and beneficiary monitoring

The project has developed an excel version of an operational plan to monitor progress against implementation milestones, which shall be digitalized and incorporated into the tool. Each activity will be tracked against predefined milestones corresponding to the indicators. Each activity will be assigned a reference number, which must correspond with data entered for the RBM to ensure consistency. Progress monitoring also extends to the activity budget, both on an annual basis and across the full duration of the project. This shall be additionally reflected in percentages.

The number of beneficiaries reached through each activity shall be tracked and monitored in a large database, which must allow filter and disaggregate various categories (e.g. age, gender, IDP/ refugee status, disability, region). The database shall automatically feed into the RBM and update the logframe.

In addition to the primary monitoring requirements the tool shall allow separate monitoring of:

c) BMZ Standard indicators:

The S2TJ project has been assigned indicators as part of the mandatory standard indicators by BMZ. These primarily concern beneficiary numbers, which need to be aggregated by category (e.g., age, gender, or other disaggregated groups). The monitoring tool should automatically extract relevant data from activity entries and display progress against the standard indicators in real time.

d) Conflict-sensitive monitoring, monitoring of unintended negative consequences

The project applies an integrated Peace and Conflict Analysis (iPCA) which guides the implementation and context and supports human-rights sensitive risk and impact monitoring. The tool shall have a separate section to include and monitor the risks and unintended negative consequences as identified in the iPCA. It should enable the tracking of potential changes in conflict patterns, contextual risks and human rights impacts as part of regular monitoring processes.

The monitoring system should provide flexible data aggregation and reporting functionalities. Data should be filterable and aggregated according to different requirements (output, region timeframe, gender, age group etc.). Non-M&E staff should be able to easily access and interpret the data. Therefore, the system should offer user-friendly data visualization features such as graphs, dashboards, maps, and other dynamic tools.

The goal of the assignment is to set up an integrated web-based monitoring system, that reflects the monitoring requirements of the S2TJ project as outlined below.

1.3 Objective of the commission/subject of the procurement

The Principal (hereinafter referred to as the Principal or GIZ) requires a digital monitoring tool in the form of a software-as-a-service solution, including services in accordance with the service description. The Contractor (hereinafter referred to as the Contractor) offers the corresponding use of such software applications via a telecommunications connection as Software-as-a-Service services.

The planned procurement of the digital monitoring tool comprises the following components, which shall be included in the Contractor's offer:

– Provision of the digital monitoring tool as a SaaS cloud solution (see 3.2)
– Operation of the digital monitoring tool software (see 3.2)
– Consulting services for conceptualization and implementation of the monitoring (see 3.1)
– Training on the use of the monitoring tool (see 3.1)
– Consulting services on continuous use and adaptations to the monitoring (see 3.1)

2 Features and requirements for the monitoring tool

2.1 Features and requirements to the SaaS Solution

With the present tender, the GIZ does not commission any IT development or customizing. Instead, the tool should be based on existing software that has already demonstrated its effectiveness and usability.

The monitoring tool supports the following needs.

Note: Certain requirements are generically formulated as “shall or should” in this description while chapter 8.2 (software criteria catalogue) explicitly defines which requirements are must-haves and will be used as exclusion criteria (A) (“shall”) and which are evaluated based on points as evaluation criteria (B) (“should”). The description includes explicit references to the respective criteria in the software criteria catalogue in chapter 8.2. The remaining criteria are evaluated based on the concept in chapter 8.1.

i. The tool should allow for **indicator-based monitoring** of the projects’ BMZ results matrixes and for organising indicators according to such logframe structures. The tool should be able to include and process the different types of indicators (see annexes), including disaggregation according to their definition (e.g., gender of participants, type of supported organisations). The tool should include functionality to allow for calculating totals from data (e.g., number of organisations based on list of organisations). It should be possible to extend and adapt the monitoring of indicators to future arising needs (due to, e.g., changes in indicators or data collection) and to the projects' willingness to enhance the monitoring and the use of the tool. The projects should be able to implement such adaptations without recourse to the consultants' services.

The tool should allow **activity and beneficiary monitoring** through a **digitalised operational work plan and an activity and beneficiary database**. The tool must allow for each activity to be entered into the system with an activity number (aligned with the operational plan). The tool must allow activity status updates (e.g. planned, ongoing, completed, delayed) to ensure continuous monitoring of progress. The operational plan assigns budgets to each activity, and the tool must therefore allow for budget entry, tracking, and analysis at the activity level. The tool should allow the project to compare planned vs. actual spending at the activity level, enabling identification of under- or over-expenditure.

For each activity, the tool should allow the entry of beneficiary data into a large data table (e.g., number of participants trained, services delivered, etc.). Beneficiary data should be disaggregated according to categories relevant for donor reporting and internal learning (e.g., gender, age, region, etc.). Beneficiary numbers should be linked to both the operational plan and automatically feed into the indicator monitoring to ensure consistency across reporting requirements.

The tool should provide a separate section for **standard indicators**. Standard indicators shall be automatically updated through calculation and disaggregation of beneficiaries according to predefined categories.

The tool should feature a **digital risk monitoring** table to allow for the entry of identified risks and unintended negative consequences categorisation by type (e.g., conflict, human rights, environmental, operational), assignment of risk levels (low, medium, high), and tracking of mitigation measures over time. The system should enable the recording of observed changes in the project context.

ii. – not applicable – The tool should include functionality to **aggregate data on indicators** that are shared by several projects. The monitoring tool should provide separate workspaces for each project's monitoring (including their respective logframe structure, indicators, monitoring data and users). The tool should be able to share or inherit indicators from one project workspace to another and to pull monitoring data on these shared indicators from multiple workspaces for aggregation in a higher-level workspace or dashboard.

iii. – not applicable – The monitoring tool should include functionality for a **case management** to collect, store, and analyse data on events, participants, and organisations from implementation of the projects' activities and to link participants, organisations, and events to monitor its outreach to target groups as well as to integrate data from activities with data from surveys on the same individuals or organisations. It shall or should (see criterion iii-1) be possible to manually enter data in a mobile app as well as to upload bulk data in the form of Excel lists. The tool shall or should (see iii-2) have functionality to detect and correct duplicate data/double-counting. It shall or should (see iii-3) allow for pseudonymisation of data in conformity with the EU General Data Protection Regulation (EU-GDPR), that is data identifying a person (e.g., name, address, telephone number) shall or should (see iii-3) be separated and stored in a data table with limited access. It should be possible to extend and adapt the case management to future arising needs. The projects should be able to implement such adaptations without recourse to the consultants' services.

iv. – not applicable – The monitoring tool should allow for separating and connecting data tables in a **relational data base**. It should be able to store data in various data tables (e.g., data on projects in a portfolio, on implementing partners, on results indicators, on thematic sector or geographic location) and to allow for flexible analysis of interlinked data. It should be possible to calculate results based on single or multiple variables and on data sets from various tables of the relational database (e.g., list of projects with a specific partner in a specific geographic region, overall budget of running projects in a specific sector, development of an indicator over time). It should be possible to select and export specific data for reporting by choosing specific variables and data sets from various tables of the relational database. It should be possible to extend and adapt data storage and calculations to future arising needs (due to, e.g., changes in indicators or data collection, additional requirements for data analysis or reporting). The projects should be able to implement such adaptations without recourse to the consultants' services.

v. The monitoring tool should provide for **processes to enter and edit data**. The tool shall or should (see criteria v-1, v-2, and v-3) support direct data entry through configurable input masks and/or an app in a unidirectional (e.g., adding additional/new data) and bidirectional (e.g., updating existing data/lists) way. It shall or should (see v-4) also support upload of data from structured Excel tables. The upload of complementary files (e.g., documents, image files as annexes to data) shall or should (see v-5) be possible. It should be possible to extend and adapt input masks and upload processes to future arising needs. The projects should be able to implement such adaptations without recourse to the consultants' services.

   a. Functionality to import data from established data collection tools (e.g., Kobo Toolbox or Survey Solutions) shall or should (see v (a)) exist.

vi. The tool should provide for processes for a **quality control** of newly entered data. The tool shall or should (see criterion vi-1) provide for an automatic quality check (e.g., on range of values/threshold value, on format, on consistency/e.g., sum of disaggregated numbers exceeding totals) and should provide for a manual approval process (including specific roles). Functionality for documenting and potentially reversing changes to data shall or should (see vi-2 and vi-3) exist.

vii. The tool should **present data in dashboards**, including options to visualise data as tables, charts/graphs, and on maps. Results in dashboards should be based on actual data in the data base ("live results"). Dashboards should be interactive and allow for filtering and drill-down into the data (e.g., proportion of women or youth, development of indicator value over time). It should be possible to generate separate dashboards for different user groups and to extend and adapt dashboards to future arising needs. The projects should be able to implement such adaptations without recourse to the consultants' services.

viii. It should be possible to **export data for further processing and analysis**. Monitoring data shall or should (see criteria viii-1 and viii-2) be exportable in file format (e.g., Excel, csv). Results displayed in the dashboards (tables, figures, diagrams) shall or should (see viii-3 and viii-4) be exportable as image files and as editable content. The tool shall or should (see viii-5) have a documented API. The tool's database should be stored in a common format to be transferable to another system when ending the use of the tool.

a. Functionality for an automated export of monitoring data into specific fields of Excel and Word templates (such as a project's BMZ results matrix document) should exist.

b. – not applicable – Functionality to integrate and automatically update content of dashboards (tables, figures, diagrams) in an external website shall or should (see viii (b)) exist.

ix. The tool should include a **user management system** that allows both for assigning users to different data sets (to limit access to personal data; also to limit a user's access, e.g., to data from his/her own component/organisation) and for assigning users to different roles (that shall or should (see criterion ix-1) include data entry, data management, viewing rights only, admin roles). Access and authorization rights governed by the user management system shall comply with the principles of data security (see chapter 9). Data entry and viewing dashboards shall or should (see ix-2 and ix-3) be possible for users without a licence. The projects should have flexibility to create and assign users according to changing needs. The projects should be able to implement such adaptations without recourse to the consultants' services.

x. The tool should be **accessible web-based**, worldwide, also with low-bandwidth internet connection, with a high level of reliability and data security. Web-based access shall or should (see criteria x-1x) be possible with Microsoft Edge and Google Chrome. The user interface and exportable deliverables (e.g., dashboards, graphics) shall or should (see x-2x) be available in English.

2.2 Further requirements

– Not applicable –

3 Responsibilities of the Contractor

The responsibilities of the Contractor are divided in consulting services and tasks directly related to the provision and operation of the tool on a SaaS-basis.

3.1 Consulting Services

The Contractor must deliver the following services and work packages along with the corresponding milestones:

Work Package 1: Conceptualization and implementation of the monitoring tool

- Analysis of existing documents on the project's monitoring, data, roles and processes for monitoring, data analysis, and reporting in view of understanding the needs.
- Consulting of the project on adapting its processes to the monitoring tool and on configurating the monitoring tool to its processes (regarding, e.g., roles and processes, data entry, data analysis and dashboards).
- Support to the monitoring team to implement the project's monitoring in the tool, according to needs and up to commissioned volume/number of working days.

Work Package 2: Supporting data migration

– not applicable –

Work package 3: Training on the use of the monitoring tool

- Design and Conduction of one online training (in English language) on use of the tool for project staff involved in the project's monitoring and data collection in different roles (totalling about one day of training time).
- Provision of documentation and training material for users (in English language), including FAQ and recording of inputs to the online training.

Work package 4: Adaptations to the monitoring

- Provision of support to the monitoring team on the continuous use and adaptation of its monitoring in the tool, according to needs and up to commissioned volume/number of working days. For example, support on integration of additional data and analysis; on development or adaptation of additional data entry masks or upload dialogues; on development or adaptation of visualisations and dashboards.

3.2 Provision and operation of the monitoring tool

The provision and operation of the monitoring tool for the entire term of the contract as software-as-a-service shall be the responsibility of the Contractor.

The services include the **continued provision, operation, and hosting** of the monitoring tool for the above-mentioned use (chapter 2) and the number of users and duration specified in chapter 11.1. The task provides for a running monitoring tool that is accessible to the intended users. It includes costs such as hosting and maintenance.

The software and the respective licenses shall be made available to the GIZ as a hosted version for the agreed rental period. The Contractor shall ensure that the system is properly maintained. The requested maintenance services shall include security updates, bug fixes and version upgrades. All costs associated with the maintenance of the monitoring tool must be included in the monthly license fee (see 10.1).

The tool and database shall be hosted and maintained by the provider with a high level of reliability and **data security**. The technical setup (including server location) and the processes need to be compliant with EU GDPR and GIZ requirements regarding data protection and IT security (see chapter 5 and 6). The Contractor shall provide reliable support for technical default and shall perform security updates and recurring data backups.

Technical support is included in the services according to defined service levels. This support is purely "technical" in the sense that it does not encompass a helpdesk or consulting of users on how to use the system – support is given in reaction to technical problems, e.g., the server not being accessible. The task does not include additional services such as consulting on the use of the tool, assisting in implementing the monitoring or data management within the tool. These services are covered by other work packages of the ToR which foresee expert days.

The initial **technical setup** of the monitoring tool (see 10.2) includes one-off costs for the setup and configuration of the tool but does not commission any services for customizing or development of features. The task does not include additional services such as consulting on the use of the tool, assisting in implementing the monitoring or data management within the tool. These services are covered by other work packages of the ToR which foresee expert days.

3.3 Service Level Agreement (SLA)

The Contractor commits to the following service level agreements:

- Service times from 9:00 to 17:00 CET on business days.
- Response time of 4h and restoration time of 8h on system failure/server outage; response time by next business day on all other requests.
- System availability of at least 95% on a 24h/7 days basis and communication of planned server downtime (e.g., for maintenance) at least 7 calendar days ahead.
- Last stored system backup not older than 7 calendar days.

3.4 Cost sharing/detailed invoicing

– not applicable –

4 Schedule and milestones

Certain milestones are to be reached on certain dates during the contract term.

The implementation / initial configuration should **begin** promptly, but no later than the date of the kick-off meeting mentioned in the table of milestones. The completion of this configuration phase and the acceptance of the system will take place following the configuration of the system as part of a final system integration, system and user test. Completion of the installation, configuration and modification services **should be ensured** by the data mentioned in the table of milestones.

Please refer to the following table for dates and milestones:

Milestone	Deadline
Kick-off meeting (work package 1)	First week after contract start
Finalisation of analysis, workshop on concept and workplan for implementation of monitoring in the tool (WP 1)	Third week after contract start
Conclusion of initial technical setup	End of 1st month after contract start
Start of continued operation of monitoring tool	Beginning of 2nd month after contract start
User management, a first data entry mask/upload dialogue, and a first dashboard implemented (WP 1)	Sixth week after contract start

Training material provided (WP 3)	Sixth week after contract start
User training for the monitoring tool concluded (WP 3)	End of 2nd month after contract start
Implementation of monitoring concluded (WP 1)	End of 3rd month after contract start
Online meeting to review monitoring tool and user feedback, identify need for adaptations (WP 4)	(5-6 months after intended start of contract
Online review of monitoring tool (WP 4)	about every 3-6 months during operation
Online review of monitoring tool (WP 4)	about every 3-6 months during operation
Project plan for export and transfer of data base (in case that contract ends)	October 2027 (about one month before end of operation)
Handing over of data base (in case that contract ends)	November 2027 (end of operation)

5 Data Protection

Personal data will be processed on behalf of the client. Therefore, an agreement on “Outsourcing of data processing (AuV)” will be concluded with the contractor in accordance with Art. 28 GDPR. For this purpose, the technical and organisational measures (TOM) for compliance with the data protection requirements must be outlined prior to conclusion of the contract. If the contractor has already been audited by GIZ in the past, an update in accordance with GDPR must nevertheless be sent. After a positive check, the contract is concluded with the AuV attachment.

Data protection by design and by default: The digital tool developed, upgraded or used on behalf of GIZ must meet the highest data protection standards, especially the GDPR’s data protection by design and by default requirement, as elaborated in the annex “The development of a data processing system under the GDPR”, to offer practical orientation to the contractor.

6 Information Security

The Contractor shall deliver the services described in these ToR in accordance with the information security requirements set out in the “Annex on Information Security”.

The aspects elaborated in the annex on “Information security considerations for M&E SaaS tools” must be considered by the contractor and if they are not within the contractor's responsibility or scope of work, they must at least be discussed with the partner's project team in order to close any existing security gaps.

The Contractor must inform the Client immediately and in an appropriate form about security incidents that may affect the Client. If the Customer has appointed an IT security officer or another person to receive such information, the information must be sent directly to this person.

Deviating from 1.2 EVB IT Cloud AGB, the requirements of C5 do not apply.

7 Language

Services, documentation and communication with the GIZ must be provided in English.

8 Technical assessment

The technical offer includes a concept (8.1), a criteria catalogue (8.2) and the CVs of the offered personnel (9.). The criteria catalogue is included in the Technical Assessment Grid and is to be filled out by the bidder. The rest of the Technical Assessment Grid will be filled out by the technical assessors of the GIZ.

8.1 Technical-methodological concept

In the concept, the bidder is required to describe how and to which degree the monitoring tool that is offered will cover the desired features of the monitoring tool described in chapter 2.2 (technical-methodological concept, the specified number of pages for each section is a guidance and no binding obligation, screenshots are in addition to text length). In doing so, the bidder is required to consider the tasks to be performed (chapter 3) with reference to the objectives of the services put out to tender (chapter 1). The extent to which the tool meets the functional requirements is assessed based on the software criteria catalogue and the technical-methodological concept.

Note: The numbers in parentheses correspond to the lines of the technical assessment grid.

Indicator-based monitoring (4 pages of text, additional screenshots shall be used to illustrate the functionalities): The bidder describes the tool's range of available functions for indicator-based monitoring (feature i). Referring specifically to indicators of the projects' BMZ results matrixes and EU logframes (see annexes), the bidder gives examples and illustrations for suitable types/formats of indicator monitoring available in the tool, including on disaggregation of these indicators. Using the example of indicator (example) (see annexed list), the bidder explains how data on such indicator would be structured in the tool (3/10 points of assessment criterion 1.1.1). The description includes whether an indicator value can be calculated from data (e.g., number of organisations being calculated from list of organisations) and a description of the implementation of such process in the tool (1/10 points of 1.1.1). The bidder describes the process to add new indicators and whether this can be done by the projects or needs an intervention by the provider (1/10 points of 1.1.1).

Similarly, the bidder describes how **activities and beneficiaries** are captured and monitored **within the tool**, referring specifically to the **digitalised operational plan** (feature i). The description shall explain how activities are entered, managed, and linked to corresponding milestones defined in the operational plan, as well as to related indicators in the results matrix. The bidder shall illustrate how activity numbers are structured to ensure traceability between the operational plan, the results framework, and the indicator monitoring (3/10 points of 1.1.1).

The bidder shall further describe how the **activity budget** is integrated into this process, including how annual and cumulative budgets can be tracked and compared with implementation progress at the activity level. The description should highlight the extent to which financial and programmatic data can be connected and visualised (e.g. through dashboards or summary tables) (feature i and vii) (2/10 points of 1.1.1).

In addition, the bidder explains how **beneficiary data** are entered, disaggregated, and aggregated within the system, and whether **standard indicators** can be automatically calculated from beneficiary numbers (e.g., total beneficiaries reached, disaggregated by gender, age, or other relevant criteria) (feature i and vii) (5/10 points of 1.1.2).

Finally, the bidder describes how the tool supports **digital risk monitoring**, specifically through a **digitalised risk table**. The description shall illustrate how risks and unintended negative consequences can be entered, updated, and tracked over time, including the ability to link risk information to specific activities, locations, or reporting periods (feature i) (5/10 points of 1.1.2).

Processes to enter and edit data (1 page of text, additional screenshots shall be used to illustrate the functionalities): The bidder describes the tool's functionality to insert data into the monitoring tool (feature v) and illustrates the user friendliness of the features to import and edit data (6/10 points of 1.3.1). The bidder explains the process for establishing or adapting such input masks or upload function, including information on who would perform such process and an example for the effort required by the projects and/or the bidder to implement a new mask or upload (to allow for conclusions whether such adaptations can be implemented by the projects without recourse to the consultant's services) (4/10 points of 1.3.1).

Quality control (1 page of text, additional screenshots shall be used to illustrate the functionalities): The bidder uses screenshots to explain the tool's functionality for performing a quality control of newly entered data (feature vi). He/she describes the tool's functionality for an approval process, including a description of roles and possible workflows (1.3.2).

Dashboards and analytics (2 pages of text, additional screenshots shall be used to illustrate the functionalities): Using screenshots and reference projects, the bidder describes how the tool's dashboards and analytics help users to understand their data. He/she presents screenshots of various examples for dashboards and states whether the tool's dashboards can present results that are calculated live/in real time from the database (feature vii) (2/10 points of 1.4.1). Referring specifically to indicators of the projects' results matrixes/logframes (see annexes), the concept shows examples of visualisations, including tables, charts/graphs, and maps and including visualisations using filters/slicers (6/10 points of 1.4.1). The bidder describes the process to establish such dashboard (including a statement on which steps cannot be implemented by the projects themselves) (2/10 points of 1.4.1).

Data export (1 page of text, in addition, screenshots may be used to illustrate the functionalities): The bidder explains possibilities to export data and results to other software for further processing (e.g., analysis, communication; feature viii). The bidder states whether data can be automatically exported to specific fields of Excel and Word templates and describes the establishment and use of such process, based on the example of exporting data into a project's BMZ results matrix document (feature viii (a)). The bidder explains in which format the tool's database is stored and how it can be transferred to another system when ending the use of the tool (1.4.2).

User Management (0.5 page of text, in addition, screenshots may be used to illustrate the functionalities): The bidder explains the tool's user management and details its administration and available user roles and functionality to restrict a user's or user role's access to data (feature ix). The description includes a statement whether the project can flexibly create and assign users (5/10 points of 1.5.1). The bidder proposes a way to separately store data identifying a person and limit access to this data to allow for conclusions whether the tool is able to pseudonymise personal data in conformity with EU-GDPR (5/10 points of 1.5.1).

Accessibility (0.5 page of text): Indicating reference projects, he/she describes experiences of (and potential constraints and workarounds for) users who have worked with the tool in areas with low-bandwidth internet connection, in particular regarding data entry or upload when the internet connection is frequently interrupted (feature x) (1.5.2).

8.2 Software criteria catalogue

The bidder shall present the existence of the requirements described in chapter 2.1 in the offered software solution. The information shall be given in the software criteria catalogue which is part of the Technical Assessment Grid (document: Technical Assessment Grid).

The bidder must fill out the criteria catalogue (column G). The criteria catalogue contains **exclusion criteria (A)** and **evaluation criteria (B)**.

The exclusion criteria must be answered with yes or no. Failure to meet (no) a must criterion will result in the exclusion of the bid.

The evaluation criteria are scored with 0 points (criterion not met) or 10 points (criterion met).

The points are added up at the end and calculated proportionally to 10 points so that they can be transferred to the evaluation scheme.

If one of the **exclusion criteria (A)** is not confirmed as given **the entire offer will be excluded**.

iii-1 ***A***	*Case management: data entry*	**– Not applicable –**
iii-2 ***B***	*Case management: double-counting*	**– Not applicable –**
iii-3 ***B***	*Case management: pseudonymisation*	**– Not applicable –**

v-1 ***A***	*Data entry: mask*	The tool supports direct data entry through configurable input masks. **(exclusion criterion)**
v-2 ***B***	*Data entry: app*	The tool supports direct data entry through an app.
v-3 ***B***	*Data entry: bidirectional*	The configurable input masks and/or app and/or API can be used in a unidirectional (e.g., adding additional/new data) and bidirectional (e.g., updating existing data/lists) way.

v-4 ***A***	*Data upload: Excel*	The tool supports upload of data from structured Excel tables. **(exclusion criterion)**
v-5 ***B***	*Data upload: files*	The upload of complementary files (e.g., documents, image files as annexes to data) is possible.
v (a) ***B***	*Data import: data collection tools*	The tool supports import of data from established data collection tools (e.g., Kobo Toolbox or Survey Solutions).

vi-1 ***B***	*Automatic quality check*	The tool has functionality for an automatic quality check on the range of values/threshold values, on format, and on consistency such as the sum of disaggregated numbers exceeding the overall total.
vi-2 ***B***	*Changes: document*	The tool can document changes to data.
vi-3 ***B***	*Changes: reverse*	The tool can reverse changes to data.

viii-1 ***A***	*Data export: Excel*	Data can be exported in Excel file format. **(exclusion criterion)**
viii-2 ***B***	*Data export: csv*	Data can be exported in csv file format.
viii-3 ***B***	*Dashboard: image export*	Results displayed in dashboards (tables, figures, diagrams) can be exported as image files.
viii-4 ***B***	*Dashboard: editable export*	Results displayed in dashboards (tables, figures, diagrams) can be exported as editable content.
viii-5 ***B***	*Documented API*	The tool has a documented API.
viii (b) ***B***	*Dashboard: website integration*	**– Not applicable –**

ix-1 ***B***	*User roles*	Data entry, data management, viewing rights only and admin roles are available in the tool.
ix-2 ***B***	*Licences: number of users*	The number of (additional) users is independent from (additional) costs of licences.
ix-3 ***B***	*Licences: non-users*	Data entry and viewing dashboards are possible for non-users and without additional costs.

x-1a ***A***	*Browser: Edge*	The tool can be used with Microsoft Edge. **(exclusion criterion)**

x-1b ***B***	*Browser: Chrome*	The tool can be used with Google Chrome.
x-1c ***B***	*Browser: (other)*	**– Not applicable –**
x-2a ***A***	*Language: English*	The user interface is available in English. **(exclusion criterion)**
x-2b ***B***	*Language: German*	**– Not applicable –**
x-2c ***B***	*Language: (other)*	**– Not applicable –**

9 Human resources

The bidder is required to provide personnel who are suited to filling the positions described, based on their CVs (see chapter 7), the range of tasks involved and the required qualifications.

Language skills are described according to the Common European Framework of Reference for Languages (CEFR). Below specified qualifications represent the requirements to reach the maximum number of points in the technical assessment (not a minimum or threshold level).

The bidder may propose the same person for more than one staff position. Which person is proposed for which position needs to be specified in the offer.

Key experts in accordance with the Special Terms and conditions of the GIZ are only those experts clearly defined as “key expert”.

9.1 Lead consultant

(section 3.1 of the assessment grid: team leader)

<u>Tasks of the lead consultant</u>

- The lead consultant has the overall responsibility for the advisory packages of the Contractor (quality and deadlines) and for personnel management (in case of implementation with a team of experts). The lead consultant is responsible for results and reporting in accordance with deadlines. He/she coordinates and manages the implementation and ensures communication with GIZ, partners and others involved in the project.
- The lead consultant advises on the concept for and supports the GIZ on implementing its monitoring in the tool (work package 1) and on future adaptations (work package 4). His/her advice is based on a thorough understanding of the commissioning party’s needs and the ability to translate the requirements into technical solutions that he/she can describe to the GIZ in practical terms.
- The lead consultant delivers the training for the tool’s users. He/she designs the training and establishes the documentation and training material (work package 3).

<u>Qualifications of the lead consultant</u>

- Education/training (3.1.1): Master’s degree or equivalent

- Language (3.1.2): English (C1 according to CEFR)
- General professional experience (3.1.3): 9 years of professional experience in consulting projects in international development cooperation
- Specific professional experience (3.1.4): 7 years of professional experience in consulting on using, designing, and implementing IT-solutions for monitoring (8/10 points) and 5 reference projects for developing and conducting trainings on monitoring tools (2/10 points)
- Leadership/management experience (3.1.5): project/team lead in 8 reference projects
- Regional experience (3.1.6): not applicable
- Development Cooperation (DC) experience (3.1.7): not applicable
- Other (3.1.8): not applicable

9.2 Monitoring expert

(section 2.2 of the assessment grid: expert 1)

Tasks of the monitoring expert

- The monitoring expert implements the project's monitoring in the tool (work package 1) future adaptations (work package 4). He/she supports the lead and/or other consultants in consulting the commission party on the concept (work package 1) and in delivering the training for the tool's users (work package 3).

Qualifications of the monitoring expert

- Qualifications (2.2.1): Master's degree or equivalent
- Language (2.2.2): English (C1 according to CEFR)
- General professional experience (2.2.3): 6 years of professional experience in consulting projects in international development cooperation on monitoring
- Specific professional experience (2.2.4): 5 years of professional experience in consulting on using, designing, and implementing IT-solutions for monitoring
- Leadership/management experience (2.2.5): not applicable
- Regional experience (2.2.6): not applicable
- Development Cooperation (DC) experience (2.2.7): not applicable
- Other (2.2.8): not applicable

Soft skills of team members

In addition to their specialist qualifications, the following qualifications are required of all team members:

- Team skills
- Initiative
- Communication skills
- Sociocultural competence

- Efficient, partner- and client-focused working methods
- Interdisciplinary thinking

10 Costing Requirements

10.1 License costs

A fixed monthly rate for the continued provision, operation, hosting, and maintenance (see work package 3) is to be offered for an **overall period of 20 months**.

If the provider calculates fees based on the number of users, projects or workspaces, they shall be calculated as a monthly rate for a **total of 15 users**. The provider needs to specify in the offer whether the number of users, projects, or workspaces is relevant for the licence costs (see chapter 3).

The license costs/fixed monthly rate for the operation covers the recurring services and costs (calculated on a monthly basis) that are related to technically provide continued access to the tool, such as, e.g., an adequate share in costs for hosting and maintaining the tool on a server (see chapter 3.2). Technical support is included according to the defined service levels and does not comprise any additional consulting to the user. The fixed monthly rate reflects the running costs of the provider's offer for using the tool.

The license costs/fixed monthly rate shall cover the provision of the tool and no other, additional services (such as, e.g., access to other software/tools or development of new features). The stated number of users does not reflect any need for services or consulting other than technically providing access to the tool.

Please do not deviate in your offer from the quantity structure (number of licenses) required in this ToR, as this is part of the competition and serves to determine objectively comparable evaluation offers. There is no entitlement to retrieve the total number of licenses offered.

Cost of the monitoring tool	Operation period in months	Comments
License costs (fixed monthly rate)	20 months	Remaining project duration

10.2 Implementation and Initial Configuration Costs

For the initial technical setup of the monitoring tool "as it is" (configuration, but no customizing or development of features) a fixed lump sum price is to be offered.

The price for the setup covers the one-off services and costs that are related to technically start providing the tool, such as, e.g., installation of software or initial configuration or initialization of a workspace or a user management (see chapter 3.2). The fixed lump sum price reflects the amount of work needed on the provider's side to start the use of the tool.

Such setup costs shall not comprise any services for customizing or development of features and shall not include any services that are not strictly needed to technically setup the tool (such as, e.g., consulting on the use of the tool, assisting in implementing the monitoring within the tool, supporting data migration, creating user groups or dashboards).

Cost of the monitoring tool	Quantity	Comments
Fee for initial technical setup (fixed lump sum price)	1	WP 1

10.3 Assignment of experts

The tender includes the provision and operation of a monitoring tool as well as the provision of associated consulting services to support implementation and use of the tool.

The work packages therefore describe either the technical implementation of the monitoring tool or additional consulting services as requested by the project.

The scope of work packages on consulting services is assessed by the project based on its needs, resulting in a given number of expert days. These must be offered by the Contractor as daily rates according to the profiles specified in chapter 9. Human resources.

In your tender, please do not deviate from the specification of quantities required in these ToRs (the number of experts and expert days, the budget specified in the price schedule). This is part of the competitive tender and is used to ensure that the tenders can be compared objectively. Please note: only services that were commissioned by GIZ and rendered by the Contractor will be remunerated. We would also like to point out that it may not be necessary to make use of the total number of proposed expert days. There is no entitlement to the retrieval of the total number of expert days offered or specified budgets. The services provided are billed according to actual expenditure.

The number of expert days corresponds to full working days.

Fee days	Number of experts	Total number of expert days	Comments
Team lead	1	7	WP 1, 3 and 4; assignment in country of residence
Monitoring Expert	1	20	WP 1, 3 and 4; assignment in country of residence

10.4 Travel expenses

– Not applicable –

The tendered services do not require travelling.

10.5 Workshops, education and training

The Contractor is not responsible for the logistical organisation of the workshops and therefore the costs do not need to be specified. All meetings and workshops are implemented as online sessions via MS Teams. They do not require travelling. There is no additional or separate budget for workshops.

The Contractor implements the training sessions described in work package 3. Trainings are implemented as online sessions via MS Teams and require no travelling. There is no additional or separate budget for trainings.

The Contractor is requested to ensure the technical implementation of workshops and, if applicable, trainings in line with the IT capabilities of the commissioning party. The consultants are requested to have their own laptops, and all software licenses required to develop the monitoring tool as well as the necessary equipment (camera, speaker, etc.) for online sessions.

10.6 Other costs

– Not applicable –

10.7 Flexible remuneration item

The fixed, unalterable budget above is earmarked in the price schedule for flexible remuneration. 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 21.5 of the Special terms and conditions of the GIZ.

Position	Quantity	Amount
Budget for flexible remuneration	1	EUR 3450 (remuneration against evidence)

11 Requirements on the format of the tender

The structure of the tender must correspond with the structure of the ToR. It must be legible (for example Arial, font size 11 or larger) and clearly formulated. The tender must be written in English.

The technical-methodological concept of the tender (chapter 9 of the ToR) should not exceed X pages (not including the cover page, list of abbreviations, table of contents, brief introduction and CV for the backstopper). Additional annexes not requested will not be assessed.

The CVs of the staff proposed in accordance with section 10 of the ToR must be in the EU format and not more than four pages in length. The CVs can also be submitted in English.

The CVs must clearly and unequivocally show what position the proposed person held, which tasks they performed and how long they worked during which period in the specified references. **The references contained in the CVs must therefore include the following information:**

- Name of the company/organisation/reference project in which the expert worked
- Position held and task(s) performed by the expert in the company/organisation/reference project

- Work outcomes or products produced by the expert, or expert's contribution to the completion of these outcomes and projects (if relevant)
- Duration of the expert's assignment in the company/organisation/reference project per calendar year in full-time expert days, weeks or months (for example: 2019: 2 months, 2020: 10 months, 2021: 1 month)
- Leadership experience/management: clear information on the reference projects or fixed positions within the company/organisation in which the requirements specified in section 4 were fulfilled (for example, period, number of persons for whom the expert had disciplinary responsibility, project budget) (if relevant)
- International professional experience/professional experience in the country of assignment: clear information on the reference projects or fixed positions in the company/organisation in which the requirements specified in section 10 were fulfilled (for example, actual duration of assignment on the ground in full-time expert days, weeks or months) (if relevant)

In order to facilitate the assessment, we request that you number the references sequentially and provide only references that are clearly related to the object of this tender.

12 Options

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

Please complete both spreadsheets in the price schedule, i.e. one for the main service and one for the optional service.

12.1 Extension of implementation period by the BMZ

Type and scope: Depending on the continued commission of the project by the BMZ (beyond its present implementation period), the project might decide to continue the use of the monitoring tool for the duration of its additional commission (up to additional … months).

The Contractor is responsible for providing the following optional services:

- continued operation and hosting of the monitoring tool and technical support and backstopping, including all costs (as described in chapter 3.2),
- additional support to conceptualization and implementation of the monitoring in the tool (work package 1) and continued support on adaptations to the monitoring (WP 4).

The tendered services do not require travelling.

Requirements: The option can only be exercised subject to the BMZ's decision on continuing the commission to GIZ to implement the project.

The option will be exercised by means of a contract extension on the basis of the individual approaches already offered.

Quantitative requirements for the optional services

Cost of the monitoring tool	**Operation period in omnths**		**Comments**
Operation costs (fixed monthly rate)	6		Chapter 3.2
Fee days	**Number of experts**	**Total number of expert days**	**Comments**
Team lead	1	2	WP 1 and 4; assignment in Germany
Monitoring expert	1	6	WP 1 and 4; assignment in Germany
Other costs	**Quantity**		**Comments**
Flexible remuneration	1500 EUR		A budget of EUR 1500 is foreseen for flexible remuneration. Please incorporate this budget into the price schedule. Use of the flexible remuneration item requires prior written approval from GIZ.
Other costs	0		No other costs.

13 Annexes

- Module proposal
- BMZ Results Matrix
- Outsourcing of data processing (AuV)
- Annex on Information Security
- “Development of Data Processing System under GDPR”
- “Information security considerations for M&E SaaS tools”