

Terms of reference (ToR) for the procurement of services below the EU threshold

CONFIDENTIAL

Designing and Implementing leadership training for government officials to align on Climate Action	Project number/ cost centre: G-011850-002
	Tender number 10002428

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0. List of abbreviations

AG	Commissioning party
AN	Contractor
AVB	General Terms and Conditions of Contract for supplying services and work
FK	Expert
FKT	Expert days
KZFK	Short-term expert
ToRs	Terms of reference

1. Context

In May 2022, Prime Minister Narendra Modi and German Chancellor Olaf Scholz established the **Indo-German Partnership for Green and Sustainable Development (GSDP)** to expedite the achievement of the **UN Sustainable Development Goals (SDGs)** and fulfil the commitments of the Paris Climate Agreement. Subsequently, **the German Federal Ministry for Economic Cooperation and Development (BMZ)** commissioned GIZ with the implementation of the project “**Support to the Green and Sustainable Development Partnership**” (**GSDP Support Project**). The project follows the objective to strengthen transformative approaches for climate policy and SDG achievement in Indo-German cooperation across three main work streams: Support services to the political partners of the GSDP; Climate adaptation; and localising the implementation of Sustainable Development Goals (SDGs).

Under the third workstream, an implementation agreement was signed between NITI Aayog and GIZ India in 2023 with the objective to strengthen the coherence of SDG implementation at national and localisation at subnational levels. Under this project, GIZ is partnering with the Department of Planning, Investment Promotion and Sustainable Development, Govt of Meghalaya to support SDG implementation, in terms of sensitising, planning, steering, and budgeting, through the SDG Cell (SDG Cell) in the State.

In Meghalaya, the state government has built the Government Innovation Lab. The Government Innovation Lab (GIL) is built on the learnings from Meghalaya’s State Capability Enhancement Project (SCEP) framework, a homegrown initiative by the Government of Meghalaya which has successfully developed and implemented innovative programs across several domains. India’s national policy think-tank, the NITI Ayog has recognised GIL as a State Institute of Transformation (SIT) for facilitating strategic planning and designing innovations across departments and stakeholders.

In Meghalaya, working on Climate Action (SDG 13) requires the coordination of up to 12-13 state departments with various responsibilities. While some departments and their respective management levels and staff have already gained a good understanding of climate action, others are still quite new to this cross-cutting topic. The Meghalaya government at highest levels demonstrates a keen interest and ambition in overcoming singular departmental approaches to climate action and is interested in improved cross-departmental cooperation and maximum efficiency in coordination and bolstering new ways of working together. The Meghalaya government also acknowledges that SDG 13 (and other SDGs) require new innovative approaches in involving all governmental levels as well as other relevant stakeholders, such as a private sector, research/academia, civil society, youth groups etc. The state government leadership aims at changing business as usual departmental practices and cross-departmental cooperation and coordination. The present structure and skill set of executive leadership levels in state departments requires new inputs, insights and understanding of how to manage and lead a crosscutting topic such as climate action.

A targeted leadership training with focus on mind shifts, thinking outside the box and reflecting and challenging standard ways of operating bureaucracies on climate action shall cater to this demand for changing business as usual work approaches. This leadership training Journey will be a co-creation between GIZ and Meghalaya GIL to bridge the gap through targeted leadership training to orient the senior government officials and equip them with tools to work with a solution-oriented approach towards climate action. This leadership training shall serve as a prototype for other Indian states and also beyond to replicate and adopt.

This leadership Journey will be a co-creation between GIZ and Meghalaya GIL to bridge the gap through targeted leadership training to orient the senior government officials and equip them with tools to work with a solution-oriented approach towards climate action.

2. Tasks to be performed by the contractor

The contractor is responsible for providing the following services:

- 1) The consultant will organize an Ideation workshop with the Meghalaya Governance Innovation Lab Team in Delhi to design and concretize the Leadership training, identify the areas to focus during the training, identify the participants, sustainability plan for the training and logistics.
- 2) The consultant will prepare a report on the agreed methodology along with detailed agenda and timelines for the session
- 3) The consultant will accordingly prepare the course material and finalise it with input from GIZ and GIL; surveys required from the participants and any other relevant material required for successful execution of the course module. Inspiration will be taken from similar trainings conducted by GIZ India in the past with the LBSNAA Training Institute
- 4) The training module will cover three workshops
 - a. 1st Workshop in Shillong – 3 days
 - b. 2nd Workshop in Germany – 5 days
 - c. 3rd Workshop in Shillong – 3 days
- 5) The consultant will ensure participation by MATI representative to assimilate the format and include it as a part of its special curriculum in the institute
- 6) The consultant will ensure with the support from the GIL to have customized examples and scenarios included in the workshop.
- 7) The consultant will support in brainstorming and identifying a local platform in the state for the participants to apply their skill with the GIZ team and the GIL Team

Deliverables

- 1) Inception Report, Agenda and course description (pdf not more than 10 pages)
- 2) Course Materials, ppts developed for the sessions (as per the requirement)
- 3) Registration sheet, event photographs and reports
- 4) Final Report of not more than 5 pages summarising the journey, highlights and recommendations for way forward
- 5) All the course materials developed will be handed over to the GIL with copies to MATI and GIZ India, and GIZ India will have the copyright to the material so developed

Certain milestones, as laid out in the table below, are to be achieved during the contract term:

Milestones/process steps/partial services	Deadline/place/person responsible
Inception Report	May 2026

Event Report of 1 st Workshop	June 2026
Event Report of 2 nd Workshop	July 2026
Event Report of 3 rd Workshop	September 2026
Final Submission of Training Material, Overall Learnings and Feedback Report from the trainees	September 15 2026

Period of assignment: from **May 1 until September 23, 2026**.

3. Concept

In the tender, the tenderer is required to show *how* the objectives defined in Chapter 2 (Tasks to be performed) are to be achieved, if applicable under consideration of further method-related requirements (technical-methodological concept). In addition, the tenderer must describe the project management system for service provision.

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

Technical-methodological concept

Strategy (1.1): The tenderer is required to consider the tasks to be performed with reference to the objectives of the services put out to tender (see Chapter 1 Context) (1.1.1) (5%). Following this, the tenderer presents and justifies the explicit strategy with which it intends to provide the services for which it is responsible (see Chapter 2 Tasks to be performed) (1.1.2) (8%).

The tenderer is required to present and explain its approach to **steering (1.3)** the measures with the project partners (1.3.1) (5%)

The tenderer is required to describe the key **processes (1.4)** for the services for which it is responsible and create an **operational plan** or schedule (1.4.1) (5%) that describes how the services according to Chapter 2 (Tasks to be performed by the contractor) are to be provided. In particular, the tenderer is required to describe the necessary work steps and, if applicable, take account of the milestones and **contributions** of other actors (partner contributions) in accordance with Chapter 2 (Tasks to be performed) (1.4.2) (3%).

The tenderer is required to describe its contribution to knowledge management for the partner (1.5.1) (3%) and GIZ and to promote scaling-up effects (1.5.2) (4%) under **learning and innovation (1.5)**.

Further requirements (1.7) (2%)

The tenderer is required to share how s/he intends to include cross-cutting themes like gender equality and gender lens into the leadership training modules

The tenderer is required to provide personnel who are suited to filling the positions described, on the basis of their CVs (see Chapter 7), the range of tasks involved and the

The below specified qualifications represent the requirements to reach the maximum number of points in the technical assessment.

4. Personnel Concept

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

The below specified qualifications represent the requirements to reach the maximum number of points in the technical assessment.

Expert

Tasks of the Expert

- Overall responsibility for the advisory packages of the contractor (quality and deadlines)
- Coordinating and ensuring communication with GIZ, partners and others involved in the project
- Personnel management, in particular identifying the need for short-term assignments within the available budget, as well as planning and steering assignments and supporting local and international short-term experts
- Regular reporting in accordance with deadlines

Qualifications of the Expert

- Education/training (2.1.1) (8%): university degree (German 'Diplom'/Master) in Political Science, Sociology, Public Policy or related fields
- Language (2.1.2) (8%): C1 level language proficiency in English and German
- General professional experience (2.1.3) (12%): 15 years of professional experience in the Organisational and Behavioural changes sector, capacity works, monitoring and evaluations, training etc.
- Specific professional experience (2.1.4) (18%): 10 years in designing and organising leadership training for government officials and organisations
- Regional experience (2.1.6) (12%): 3 years of experience in projects in Asia, of which 2 years in projects in India
- Development cooperation (DC) experience (2.1.7) (7%): 5 years of experience in DC projects
- Other (2.1.8): evidence of conducting at least 1 leadership training or training focusing on climate change for government officers at national and state-level each for India.¹
(Exclusionary Criterion)

¹ **Exclusionary Criterion: If this requirement is not met, the bidder will be excluded from evaluation**

5. Costing requirements

Assignment of personnel and travel expenses

Per diem allowances are reimbursed as a lump sum up to the maximum amounts permissible under tax law for each country as set out in the country table in the circular from the German Federal Ministry of Finance on travel expense remuneration (downloadable from the [German Federal Ministry of Finance – tax treatment of travel expenses and allowances for international business travel as of 1 January 2024/2025 \(GERMAN ONLY\)](#)).

Accommodation allowances are reimbursed as detailed in the specification of inputs below.

With special justification, additional Accommodation costs up to a reasonable amount can be reimbursed against evidence.

All business travel must be agreed in advance by the officer responsible for the project

Sustainability aspects for travel

GIZ has undertaken an obligation to reduce greenhouse gas emissions (CO₂ emissions) caused by travel. When preparing your tender, please incorporate options for reducing emissions, such as selecting the lowest-emission booking class (economy) and using means of transport, airlines and flight routes with a higher CO₂ efficiency. For short distances, travel by train (second class) or e-mobility should be the preferred option.

CO₂ emissions caused by air travel must be offset. GIZ specifies a budget for this, through which the carbon offsets can be settled against evidence.

There are many different providers in the market for emissions certificates, and they have different climate impact ambitions. The [Development and Climate Alliance \(German only\)](#) has published a [list of standards \(German only\)](#). GIZ recommends using the standards specified there.

Specification of inputs

Fee days	Number of experts	Number of days per expert	Total	Comments
Key Expert	1	43	43 days	
Travel expenses	Quantity	EUR	Total EUR	Comments
Per-diem allowance in Shillong, India	10	22	220	Lump sum/number
Per-diem allowance in Germany	10	28	280	Lump sum/number

Overnight allowance in Shillong, India	10	80	800	<p>Against Evidence and as applicable</p> <p>Overnight stays abroad:</p> <p>Note: Under the BMF travel expense regulations, overnight allowances not exceeding 100% (EUR 80) of the lump sum amounts can be submitted for reimbursement against evidence. Up to 75% (EUR 60) of the maximum rates specified in the travel expense regulations can be submitted for reimbursement on a lump-sum basis.</p> <p>Please indicate in the price schedule whether your offer is on a lump-sum basis or against evidence.</p>
Overnight allowance in Germany	10	130	1.300	<p>Against Evidence and as applicable</p> <p>Overnight stays abroad:</p> <p>Note: Under the BMF travel expense regulations, overnight allowances not exceeding 100% (EUR 130) of the lump sum amounts can be submitted for reimbursement against evidence. Up to 75% (EUR 80) of the maximum rates specified in the travel expense regulations can be submitted for reimbursement on a lump-sum basis.</p> <p>Please indicate in the price schedule whether your offer is on a lump-sum basis or against evidence.</p>
Transport	Quantity	Number per expert	Total	Comments
International flights India	4	1	4	<p>Travel to the place of service delivery Germany to India (two workshops in Shillong)- Total of 3 round trips Germany – New Delhi</p> <p>against evidence.</p>

Domestic flights	4	1	4	2 round trips from New Delhi to Shillong against evidence.
CO₂ compensation for air travel	8	1	8	A fixed budget of EUR 134 Euros is earmarked for settling carbon offsets against evidence. (2x EUR 12=EUR 24 /2x EUR 55=EUR 110)
Travel expenses (train, car) <ul style="list-style-type: none"> • Local Transport in Germany • Local Transport cost in Shillong 	14	1	14	Travel within the country of assignment, transfer to/from airport etc. against evidence

6. Inputs of GIZ or other actors

GIZ and/or other actors are expected to make the following available:

- Transportation on site with own project vehicle in Shillong
- Logistics for workshops in Shillong will be provided by the State Partner
- Travel cost for the state officials travelling to Delhi from Shillong will be borne by the state government

7. Requirements on the format of the tender

The structure of the tender must correspond to the structure of the ToR. In particular, the detailed structure of the concept (Chapter 3) should be organised in accordance with the positively weighted criteria in the assessment grid (not with zero). The tender must be legible (DINA 4 font size 11 or larger) and clearly formulated. It must be drawn up in **English** (language).

The consultant must adhere to the data protection laws of EU and India.

The complete tender must not exceed **10 pages** (excluding CVs). If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment. External content (e.g. links to websites) will also not be considered.

The CVs of the personnel proposed in accordance with Chapter 4 of the ToRs must be submitted using the format specified in the terms and conditions for application. The CVs shall not exceed **4 pages** each. They must clearly show the position and job the proposed person held in the reference project and for how long. The CVs can also be submitted in English (language).

Please calculate your financial tender based exactly on the parameters specified in Chapter 5 Quantitative requirements. The contractor is not contractually entitled to use up the days, trips, workshops or budgets in full. The number of days, trips and workshops and the budgets will be contractually agreed as maximum limits. The specifications for pricing are defined in the price schedule.