

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

CONFIDENTIAL

IFMIS enduser training review

**Project number/
cost centre:**

G-011792-002

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0. List of abbreviations

Acronym	Definition
AGD	Accountant General's Department
AVB	General Terms and Conditions of the Contract
BMF	German Ministry of Finance
BMZ	German Federal Ministry of Economic Cooperation and Development
GHG	Climate Hazard Group
GIZ	German Agency for International Development
GOM	Government of Malawi
IFMIS	Integrated Financial Management Information System
MDA	Ministry, Department and Agenciest
OECD	Organisation for Economic Cooperation and Development
PFEM	Public Financial and Economic Management

1. Context

From April 2022 to March 2028, the German Agency for International Development Cooperation (GIZ) implements the Strengthening Public Financial and Economic Management (PFEM) programme in Malawi on behalf of the German Ministry for Economic Cooperation and Development (BMZ). PFEM has been operational in Malawi since 2012.

From May 2024 to December 2027 time period, PFEM has been commissioned to incorporate a German Government/EU co-funded Joint Action, called “PFEM-Tikuze Malawi”. With that, the PFEM program has been expanded conceptually to blend support to key public financial management and anti-corruption institutions.

In its expanded form, PFEM is structured into five results areas, namely: (1) revenue mobilization, (2) expenditure and contract management, (3) financial control and oversight, (4) investigation & prosecution, (5) Judicial processes & asset forfeiture and management. Across these outputs, the project provides policy, strategic and organisational advisory services and supports human capacity development measures. The digitalization of work processes, inter-agency collaboration and corresponding change management form cross-cutting characteristics of program interventions.

PFEM requires services of a Expert-1 to undertake training review of IFMIS enduser training and its sustainability in future

Under Output -2 (Expenditure and Contract Management) PFEM has been supporting IFMIS enduser training. As per the estimates of the AGD, a total of 3,500 endusers were to be trained to make best use of the IFMIS in different MDAs (Ministries, Department and Agencies). Periodical trainings are conducted and so far 26 Cohorts of training would have been completed by Sep, 2025.

2. Tasks to be performed by the Expert

The Expert is required to apply the [OECD evaluation criteria](#) to evaluate the effort of training so far with the objective that the findings should guide future training and further sustainability of training.

The contractor is responsible for providing the following services:

- Describe to PFEM how the OECD criteria will be applied
- Engage the stakeholders involved in IFMIS enduser training from the Accountant General's Department and other MDAs
- Conduct each relevant element of the evaluation criteria in the domain area
- Undertake Survey, focus group discussion, interviews or any other methodology to draw the response from the enduser group relevant to the topic and validate the responses
- Collect, analyse and interpret the results of the responses
- In addition to evaluation of the current training exercise, the evaluation should include proposal for taking the training forward on a sustainable basis in most efficient and economic manner for AGD
- Present and validate preliminary reports with PFEM and AGD – these reports will be in two parts – (i) evaluation of the current training and the conclusions and (ii) how to continue the training for AGD in most efficient and economic manner.
- Prepare a final report for both the above parts

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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
IFMIS Training evaluation and sustainability	
Inception Report	5 days from start
Data Collection and Analysis	15 days from the start
Presentation of draft Report	25 days from the start
Final action-oriented report	30 days from the start

Period of assignment: from 01 June 2026 until 31 October 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).

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). 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).

The tenderer is required to present the actors relevant for the services for which it is responsible and describe the **cooperation (1.2)** with them.

The tenderer is required to describe the key **processes** for the services for which it is responsible and create an **operational plan** or schedule (1.4.1) 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).

4. Personnel concept

The tenderer is required to submit CV containing the qualifications, professional qualifications, experiences etc. and any other information relevant to the assignment.

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

Tasks of the to be performed by 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
- Regular reporting in accordance with deadlines

Qualifications of Expert

- Education/training (2.2.1): Graduate university degree in Management, IT Services or Public Financial Management or any relevant field. (10/10)
- Language (2.2.2): C1-level language in English (10/10)
- General professional experience (2.2.3): 7 years of professional experience in Public Financial Management in Public Sector institutions (10/10)
- Specific professional experience (2.2.4):
 - 2 examples of conducting training evaluations (2/10)
 - 1 example of conducting training strategy development (3/10)
 - Demonstrated experience of evaluating training implementation (1 example) and training strategy development (1 example) related to large-scale IT system implementation (3/10)
 - 1 example of evaluations (training or projects) based on OECD evaluation criteria or similarly rigorous criteria (2/10)
- Regional experience (2.2.6):
 - 1 example of relevant work experience (evaluation and or need assessment) delivered in Sub-Saharan Africa (region) (10/10)
- Development Cooperation experience (2.2.7): 2 examples of working with international development partners and/or multi-lateral organizations in developing countries. (10/10)

Soft skills of the Expert

The following qualifications are required from the Expert to work with the team in AGD:

- Team skills
- Initiative
- Communication skills
- Socio-cultural skills
- Efficient, partner- and client-focused working methods
- Interdisciplinary thinking

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

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 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
Expert for review of IFMIS training	1	30	30	
Travel expenses	Quantity	Number per expert	Total	Comments
Per-diem allowance in country of assignment	42 x 41.-€	1	1.722.-€	
Overnight allowance in country of assignment	42 x	1		Overnight stays abroad: Note: Under the BMF travel expense regulations, overnight allowances not exceeding 100% of the lump sum amounts can be submitted for reimbursement against evidence. Up to 75% of the maximum rates specified in the travel expense regulations can be submitted

				<p>for reimbursement on a lump-sum basis.</p> <p>Overnight stays in Malawi (deviation from the travel expense regulations):</p> <p>Note: Overnight allowances of up to EUR 109 can be submitted for reimbursement against evidence. Up to EUR 81,75 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 Lilongwe, Malawi	1	1	2.000.-€	Travel to the place of service delivery Lilongwe, Malawi reimbursement against evidence.
CO₂ compensation for air travel	2	70.-€	140.-€	A fixed budget of EUR 140.- is earmarked for settling carbon offsets against evidence.
Travel expenses (train, car)	1	1000.-€	1000.-€	Travel within the country of assignment and home country, transfer to/from airport as well as local travel to undertake the assignment etc.
Other travel expenses	1	100.-€	100.-€	Visa fees
Other costs	Number	Price	Total	Comments
Flexible remuneration	1	2.000.-€	2.000.-€	<p>A budget of EUR 2000.- is foreseen for flexible remuneration. Please incorporate this budget into the price schedule.</p> <p>Use of the flexible remuneration item requires prior written approval from GIZ.</p>

6. Inputs of GIZ or other actors

The expert will work closely with the AGD Director of IFMIS and the IFMIS enduser training team as well as stakeholders. In facilitating the delivery of the technical assistance, AGD will designate a Coordinator to support the Expert in their work and logistics. AGD shall provide the Expert with the required office space, logistics, administrative support, premises for meetings and other similar resources needed to set up presentations in the framework of this assignment.

The logistics for workshops proposed as part of the bid (e.g. location, catering) will be covered by the GIZ PFEM project.

The contractor is to take note of visa requirements that must be met to enter Malawi (e.g. yellow-fever vaccination).

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 (font size 11 or larger) and clearly formulated. It must be drawn up in English (language).

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 only 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.