

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

10018005

CONFIDENTIAL

Customization of an event and case management software and development of related dashboards	Project number/ cost centre: G-012304-001
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0. List of abbreviations

AG	<i>Auftraggeber</i> Commissioning party
AHK	<i>Deutsche Auslandshandelskammer Chile</i> Chilean-German Chamber of Commerce
AN	<i>Auftragnehmer</i> Contractor
API	Application Programming Interface
ARM	Alliance for Responsible Mining
CEFR	Common European Framework of Reference for Languages
CEPAL	<i>Comisión Económica para América Latina y el Caribe</i> United Nations Economic Commission for Latin America and the Caribbean
EVB-IT	Supplementary Terms and Conditions for the Procurement of IT Services
FK	<i>Fachkraft</i> Expert
FKT	<i>Fachkrafttage</i> Expert days
GIZ	<i>Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH</i> German Development Cooperation institution
KZFK	<i>Kurzzeitfachkraft</i> Short-term expert
NRGI	Nature Resource Governance Institute
SaaS	Software as a Service
ToRs	Terms of References
TrC	Triangular Cooperation

1. Context

The *Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH* supports the German Federal Government in achieving its objectives in the field of international cooperation for sustainable development. Within the framework of global challenges, international cooperation focuses on socio-ecological transformation, renewable energies, climate protection and adaptation measures, as well as the conservation of biodiversity. GIZ operates in around 120 countries worldwide and aims to strengthen the living conditions of people in partner countries, thereby contributing to sustainable global development. GIZ serves as a cooperation partner for politics, business, science, and civil society. Through its technical advisory services to local partners, GIZ contributes to the implementation of agreements in the areas mentioned above.

GIZ has established the CEPAL-DEK Cluster, through which it implements projects under two programmes in Latin America and the Caribbean (LAC): the Strategic Alliance between the United Nations Economic Commission for Latin America and the Caribbean (CEPAL, by its Spanish acronym *Comisión Económica para América Latina y el Caribe*) and the German Federal Ministry for Economic Cooperation and Development (BMZ), as well as the Regional Fund for Triangular Cooperation with Partners in LAC, financed by BMZ. The related projects cover a wide range of topics: digital economy, economic transformation, raw materials management and sustainable mining, care economy, circular economy, as well as – in collaboration with the European Union – digital policies and energy transition.

More concretely, the following projects are being implemented:

The project “**Productive, Ecological, and Socially Just Economic Transformation in Latin America and the Caribbean**” (WiTra) which is commissioned by BMZ and implements activities in the fields of fiscal, industrial and social policy and in close collaboration with CEPAL. The activities consist either of regional fora at policy or technical level, capacity building measures for individuals in public and private entities related to the fields addressed by the project, and technical assistance related to policy development for Latin American countries who seek support in the three mentioned thematic areas. The project works with the Division for Economic Development (fiscal policy), Division for Social Development (social policy) and the Production, Productivity and Management Division (industrial policy) within CEPAL.

“**Minerals for a Just Transition in Latin America and the Caribbean**” (Minjust) is a project commissioned by BMZ and cofinanced by the EU that seeks to support countries in the region to harness the growing demand for minerals that are critical for the energy transition while upholding social and environmental standards. It covers the topics of local value creation, revenue management, environmental impact, human rights and gender as well as technical and vocational education and training. It is implemented by GIZ in partnership with the Division for Natural Resources and the Division of Sustainable Development and Human Settlements of CEPAL; the Chilean-German Chamber of Commerce (AHK); the Natural Resource Governance Institute (NRGI) and the Alliance for Responsible Mining (ARM).

The project “**Promoting the Circular Economy in Latin America and the Caribbean**” (PEC) is carried out within the framework of the CEPAL–BMZ Strategic Alliance and supports the countries of the region in their transition from a linear to a circular economy. Its objective is to create the conditions for CEPAL to provide comprehensive, tailored assistance that responds to national needs in order to drive inclusive and sustainable circular-economy models. The

action is implemented in cooperation with the Division for Sustainable Development and Human Settlements and the Production, Productivity and Management Division within CEPAL.

The **“EU-LAC Digital Alliance Policy Dialogues”** are part of the regional Team Europe Initiative EU-LAC Digital Alliance under the Global Gateway Investment Agenda. The multi-partner action (DE, EE, FR, EST, SI) aims to improve and harmonise digital policy and regulatory frameworks through interregional dialogue. It provides a structured multi-stakeholder platform for LAC, the EU, and its Member States to work together on regulatory frameworks for inclusive and sustainable digital policies and governance mechanisms across five key areas: cybersecurity, data governance, e-governance, meaningful connectivity, and artificial intelligence (AI). Each topic is co-led by partners from both LAC and the EU, following a collaborative co-leadership model. Germany (GIZ) coordinates the action in its role as secretariat, leads the meaningful connectivity component, and supports the AI component.

The **“Digital Transformation for Regional Integration” (D4R)** project is an initiative commissioned by BMZ and implemented with CEPAL under the CEPAL-BMZ Strategic Alliance. Since 2024, it has supported the development of more productive, inclusive, and resilient digital ecosystems in Latin America and the Caribbean by promoting responsible, evidence-based digital policies aligned with European priorities and the Global Gateway. Its operational core is the *Digital Transformation Policy Lab (DLAB)*, institutionalised within CEPAL, which develops practical tools such as a simulator for productive digital transformation, guidelines for AI regulatory sandboxes, and data-maturity models for public administration. Through these instruments and through structured public-private dialogues on AI, data governance, and the digital economy, D4R strengthens state capacities, advances the regional eLAC agenda, and enhances the participation of non-state actors in modern digital policymaking.

The project **“Care Economy for Sustainable Economic Development with Gender Equality in Latin America and the Caribbean”** is implemented within the framework of the CEPAL–BMZ Strategic Alliance and strengthens the region’s efforts to recognize, reduce and redistribute unpaid care work while promoting decent work in the paid care sector. Its objective is to create the conditions for CEPAL to provide comprehensive, demand-driven support to countries in designing and implementing care policies that respond to demographic, economic and social challenges. The action is carried out in close cooperation with CEPAL’s Division for Gender Affairs and builds on CEPAL’s regional leadership in care-policy development, data generation and intergovernmental consensus. Through this partnership, the project contributes to positioning care as a central pillar of sustainable and inclusive development in Latin America and the Caribbean.

The **Regional Fund for Triangular Cooperation with Latin American and Caribbean Partners** is a pioneering initiative and aims to strengthen triangular cooperation (TrC) in the Latin American and Caribbean region for national and global development. It has been operating since 2011 and is funded by BMZ and implemented by GIZ. The aims to strengthen public policies for sustainable development through TrC between partner countries in the region together with Germany. The Regional Fund is based on the implementation of individual measures (projects), the promotion of regional policy dialogue on TrC and capacity building activities in support of the management of these measures. The latter area aims to strengthen links between entities, organisations, institutions, etc. and thus to foster the modality and contribute to the development of staff skills.

The projects implemented in the CEPAL-DEK Cluster pursue their objectives through collaboration with national institutions on specific technical focus areas in the respective partner countries (technical assistance), and through regional exchange and dialogue formats that include not only representatives of government institutions but also civil society and academia.

Currently, each project plans its activities in separated excel sheets. Each project also creates its own repositories of organizations and beneficiaries. Overviews of activities across projects are created through additional excel sheets with are not linked to the original planning sheets of each project and hence require manual update. Moreover, each project has its own approach to document progress against indicators.

Hence, coordination and monitoring of the activities of all these projects is time consuming, prone to errors, as data is duplicated in several sheets. Therefore, the CEPAL-DEK Cluster seeks to develop a joint digital approach among the different projects to document, monitor, analyse and evaluate activities and impacts and to manage the data related to individuals, organizations, results through a relational database.

The contract to be awarded through these Terms or References (ToRs) seeks to enable the cluster and its management to:

- 1) harmonize and systematize data generated by the implementing partners as well as within the different projects of the CEPAL-DEK Cluster,
- 2) reduce the lead-up time of the generation of reports on input, process, output, outcome, and impact level,
- 3) facilitate categorisation, monitoring and analysis of activities implemented within the CEPAL-DEK Cluster
- 4) visualize data of supporting the impact narratives of the projects of the CEPAL-DEK Cluster
- 5) ease coordination, data exchange and data reuse between the different projects of the CEPAL-DEK Cluster.

To this end, the CEPAL-DEK Cluster plans to commission the services of a software company that customizes an existing set of software modules according to the needs of the projects to create, read, update and delete records of the following data entities: budgets, expected results (targets), actions (projects, work packages, activities), organisations, individuals, target groups, capacity development products, sectors, skills, inventory items and events related to service delivery. Moreover, the software modules should be able to establish relationships between the entities above that allow for the usage of data entered in one record of an entity for records in other entities. The software modules should allow the aggregation of results across projects and partner organisations. In addition, the software modules should allow the creation of indicators of success and pull the data for these indicators from the records in the data entities, whenever the indicator allows. Finally, a set of dashboards should be designed to visualize the records in the data entities.

Partner Landscape

Project partners include the Division of Economic Development, the Division of Productive and Entrepreneurial Development, the Division of Social Development, the Division for Natural Resources, the Division for Sustainable Development and Human Settlements and the Division of Gender Affairs, within CEPAL, as well as other organizations implementing on behalf of the projects of the CEPAL-DEK Cluster, such as the AHK, NRG, ARM, among others. Participants in fora are civil servants working in state agencies, representatives of civil society as well as the private sector.

Objectives of the assignment

- Objective 1: Reduce the time and effort required to capture, process and consolidate data generated by the different implementation partners.
- Objective 2: Strengthen capacity of the CEPAL-DEK Cluster's projects and its implementation partners to process and analyse data obtained during the implementation of their activities.
- Objective 3: Harmonize the data generated by the different implementation partners so that the projects can easily consolidate the results of their work for purposes of project management and reporting.
- Objective 4: Strengthen coordination between the different projects through the usage of a shared registry of actions, organizations and individuals.

Approach / methodology

To achieve the above-mentioned objectives, it is key to understand the workflows and systems of the CEPAL-DEK Cluster's projects and their implementation partners, identify most viable options to integrate the above-mentioned modules into their workflows, train the implementation partners in the usage of the modules and to provide technical support to clear bugs or clarify questions of users on the software modules.

The contractor will hence customize existing applications to meet the requirements of the projects of the CEPAL-DEK Cluster and its implementation partners. The usage of the applications will be license-based. To minimize the financial burden of the long-term use of the event management software on the implementation partners, at least the modules related to event and case management must be open source.

Technical assessment of submitted software solutions

To prove its ability to provide the requested features and works and services listed below, the bidder shall in its bid fill in the respective template "Requirements List". The Requirements List includes "MUST from start" and "CAN" requirements. The bidder shall state in their comment to each criterion if their current product already includes the feature or if it their standard solution would have to be customized to meet the criterion. If a "MUST from start"-criterion is not fulfilled, the bid will be deemed as technically insufficient and will be excluded from the tender.

The bidder must hand in the Requirements List, filled in in column "G" and "H" (MUST-Criterion), which is part I of III of the technical proposal.

Please note that all requested MUST from start-Criteria must be already included in the standard solution. Otherwise, the bid will be excluded from the tender. Further information on the "MUST from start" and "CAN" requirements is given in the section "Further requirements" (p. 11 onwards).

2. Tasks to be performed by the contractor

The contractor is responsible for providing the following services:

The contractor will customize a project monitoring module, an event and case management module and develop dashboards according to the requirements of the CEPAL-DEK Cluster's

projects and its partners, develop training material, deliver trainings, and provide user support. These services are described further below.

2.1 Provision of existing software products

2.1.1 Provision of a project monitoring software module

The contractor shall provide a solution fit to create, read, update, delete values in customizable data entities and create relations to other data such as expected results (indicators and targets) at different levels of granularity; actions at different levels of granularity (programme, project, work package, activity, task), categories of actions; organisations; categories of organisations; budgets, display results with customisable dashboards; design approval workflows; administer individual project portals; import data from external sources and export data into different formats based on existing Software as a Service (SaaS) IT-Solutions.

The solutions need to meet the requirements of the CEPAL-DEK Cluster's projects and its implementation partners that are further specified in Annex 2 – Data entities, business rules and user stories of the CEPAL-DEK Cluster's projects Monitoring and Event Management System.

Further details of each requirement are elaborated in section "Further Requirements" (p.11 onwards).

2.1.2 Provision of an event management software module

The contractor shall provide a solution fit to create, read, update, delete and create relations to other data for budgets; expected results; units of scope at different levels of granularity (programme, project, work package, activity, task); events; event types; organisations; individuals; target groups; Capacity Development Products (CDPs); skills; and venues. Moreover, the software module should allow managing workflows related to events; generate aggregated reports per target, CPD, venue, event, and person; generate specific reports per CDP; generate specific reports per venue; generate specific reports per event and generate specific reports per person on existing SaaS IT-Solutions.

2.2 Customization of aspects of the project monitoring and the event management modules

2.2.1 Customization of a project monitoring module

The system shall be able to aggregate the results of records of different levels of granularity along parent-child relationships within the data entity "actions". For example, the participants all events related to one activity must be easily aggregated as a shared result of that activity, and all the results of a set of activities that belong to one work package must be aggregated as a shared result of that work package.

Other requirements to be met through customization are described in the requirements catalogue.

2.2.2 Customization of an event and case management module

The event management system shall allow users to customize business rules such as inheritance of properties along parent-child relationships, filtering options based on user profiles as well as rule-based activation and deactivation of data entry-fields.

The project monitoring and event management modules represent an integrated software solution. The contractor shall develop shareable displays that visualize data from the project monitoring and the event management modules in real time. This includes a visualization of actions in different timeline formats and visualizations of the geographical distribution of actions and customized views of the actions list in a world map.

Other requirements to be met through customization are described in the requirements catalogue. The solutions need to meet the requirements of the CEPAL-DEK Cluster's projects and its implementation partners that are further specified in Annex 2 – Data entities, business rules and user stories of the CEPAL-DEK Cluster's projects Monitoring and Event Management System.

2.3 The contractor shall provide licenses for customized SaaS modules

- Provision of licenses pursuant to the licensing model described in Chapter 5 (Costing requirements).
- User support and technical backstopping.
- Help Desk Support with a dedicated email for support queries.
- Full hosting, security management, backups and technical support.
- Technical backstopping to all users. This includes technical support for investigating and fixing bugs and issues reported by users.
- Maintenance and service guarantees of the software's functionality

The services provided shall meet the following requirements:

- The enhancements and customisations that may be required to the existing modules are to be developed and deployed in parallel to the existing product.
- A repository of guides and tutorial videos for all features mentioned above that must be in place from the start of the contract must exist and be publicly available within 1 month of the start of the contract.
- User requests for support (via email or a live chat feature) should be responded within a maximum 24 hours during working days (Mon-Fri).
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- The software module must allow for settings, by GIZ CEPAL-DEK Cluster's projects and each organisation managing a project, that reflect the agreement between GIZ CEPAL-DEK Cluster's projects and each of these organisations on which data to be displayed to whom and to be passed on to whom. The contractor will assist GIZ CEPAL-DEK Cluster's projects and the organisations in selecting and implementing the respective settings and will retain (or delete) the data as instructed by CEPAL-DEK Cluster's projects and the organisations respectively.
- The contractor is responsible for selecting, preparing, training, and steering the international and national, short, and long-term experts assigned to perform the advisory tasks.
- The contractor provides equipment and supplies (consumables) and assumes the associated operating and administrative costs.

- The contractor manages costs and expenditures, accounting processes and invoicing in line with the requirements of GIZ.
- The contractor reports regularly to GIZ in accordance with the current Special terms and conditions of the GIZ.

Provide maintenance and technical support during testing and deployment for the duration of the contract:

- 1st and 2nd level support for user requests
- 3rd level support for troubleshooting as defined by the following classes:

Service Level	Response time	Recovery time	Contact channel
Priority 1 fault (operation preventing failure ¹)	3 hours	≤ 1 workday	Phone
Priority 2 fault (operation impeding event ²)	8 hours	≤ 3 workdays	E-Mail
Priority 3 fault (minor disturbance ³)	2 workdays	≤ 5 workdays	E-Mail

1. Operation preventing failure: Malfunction that does not allow the use of the system or is severely restricted.

2. Operation impeding event: Disruption of operation exists in the system and is considerably restricted, making the function of the normal process not possible. A disruption also exists if the minor disruptions lead to a not inconsiderable restriction.

3. Minor disturbance: is deemed to exist if the use of the system is possible with restrictions.

Work schedules are from Monday through Friday, from 08:00 to 16:00 Central European Time (CET), with the exception of national holidays.

Availability: 99.0% in accordance with EVB-IT Cloud GTC

Tasks

Maintenance and technical support includes the following tasks:

- Monitoring and updating the server applications and services
- Monitoring and updating the underlying (web) application, frameworks and other dependencies
- Bug and error fixing
- Communicating with the hosting provider in the event of critical incidents
- Report on support inquiries that have been addressed
- Report on operational and maintenance activities

2.4 Quality assurance

The contractor will ensure the quality of the applications.

The contractor will outline their approach to quality assurance for the assignment.

2.5 Training

User training that includes online webinars, guides, tutorial videos and self-paced training tools.

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
Initial planning and consultation • Initial consultations with implementing partners to understand organisational use cases, staffing, etc • Preparation of customised training and onboarding plans for recruited implementation partners • Development of digital training materials (presentations, how-to articles, etc) • Delivery of trainings to first batch of implementation partners • Conducting of initial feedback and insights gathering sessions with implementations partners • Preparation of a delivery plan for the CAN criteria.	3 weeks after the beginning of the contract
Software Design & Initial Delivery Phase 1 • Preparation and delivery (deployment) of at least 4 out of 12 “CAN-criteria 2.1 - project monitoring software” and 9 out of 28 “CAN-criteria 2.2 - event management software module”. • Training and onboarding of newly recruited implementing partners	10 weeks after the beginning of the contract
Deployment of at least 4 out of the remaining 8 “CAN-criteria 2.1 - project monitoring software” and 9 out of the remaining 19 “CAN-criteria 2.2 - event management software module”	18 weeks after the beginning of the contract
Deployment of the remaining 4 “CAN-criteria 2.1 - project monitoring software” and the remaining 10 “CAN-criteria 2.2 - event management software module”	26 weeks after the beginning of the contract
Feedback, Learning, Improvement • User feedback sessions • High level compilation and reporting of insights and learnings and how these are to be translated into platform improvements.	Starting from 10 weeks after the beginning of the contract
Software Design & Initial Delivery Phase 2 • Integration of feedback into module deployment	30 weeks after the start of the contract

Period of assignment: from the beginning of the contract until 31.05.2028

3. Concept

In the tender, the tenderer is required to show *how* the objectives defined in Chapter **Fehler! Verweisquelle konnte nicht gefunden werden.** (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 **Fehler! Verweisquelle konnte nicht gefunden werden.** 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 **Fehler! Verweisquelle konnte nicht gefunden werden.** 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 present and explain its approach to **steering** the measures with the project partners (1.3.1) and its contribution to the **results-based monitoring system** (1.3.2).

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 **Fehler! Verweisquelle konnte nicht gefunden werden.** (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).

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

Project management of the contractor (1.6)

The tenderer is required to explain its approach for coordination with the GIZ project. In particular, the project management requirements specified in Chapter 2 (Tasks to be performed by the contractor) must be explained in detail.

The tenderer is required to describe its backstopping concept. The following services are part of the standard backstopping package, which (like ancillary personnel costs) must be factored into the fee schedules of the staff listed in the tender.

- Service-delivery control
- Managing adaptations to changing conditions
- Ensuring the flow of information between the tenderer and GIZ
- Assuming personnel responsibility for the contractor's experts
- Process-oriented steering for implementation of the commission
- Securing the administrative conclusion of the project

In addition to the reports required by GIZ in accordance with 6. EVB-IT Terms and Conditions, the contractor submits the following reports:

- Inception report
- Brief quarterly reports on the implementation status of the project (5-7 pages)

Further requirements (1.7)

The criteria listed in Annex 4 – Requirements List (a total of 137 criteria) are divided into the categories “MUST” and “CAN”. **Failure to meet any criterion marked as “MUST” will result in exclusion from the tender.**

In addition to the MUST criteria mentioned in the “Requirements List”, the list also features CAN criteria. These criteria are desirable but not indispensable features. The bidder can receive the respective maximum number of points in the assessment grid section 1.7 for each CAN-Criterion as given in the Requirements List and the technical assessment grid. (see Annex 4 – Requirements List)

4. Personnel concept

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 required qualifications.

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

Team leader

Tasks of the team leader

- 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 team leader

- Education/training (2.1.1): university degree (German Diplom/Master or equivalent) in Development Studies, Development Economics or similar
- Language (2.1.2): C1-level language proficiency in English
- General professional experience (2.1.3): 7 years of professional experience in the management of software development sector
- Specific professional experience (2.1.4): 5 years in managing or coordinating the development and implementation of monitoring and evaluation software systems or comparable digital platforms e
- Leadership/management experience (2.1.5): 2 years of management/leadership experience as project team leader or manager in a company

- Regional experience (2.1.6): not applicable
- Development cooperation (DC) experience (2.1.7): 2 years of experience in DC projects

Key experts 1

Tasks of key expert 1

- Management of the engineering and design resources and activities
- Collection, validation and delivery of product specification
- Translation of project insights into software improvements and feature development.

Qualifications of key expert 1

- Education/training (2.2.1): university degree (German Diplom/Master or equivalent) in Computer Science, Software Engineering, Information Systems, Informatics, Data Science, Computer Engineering or a comparable field relevant to software development.
- Language (2.2.2): C1 -level language proficiency in English
- General professional experience (2.2.3): 7 years working experience in software development
- Specific professional experience (2.2.4): 5 years of professional experience in software development of monitoring and event management systems
- Leadership/management experience (2.2.5): 2 years of professional experience in management of software development projects
- Regional experience (2.2.6): not applicable
- Development Cooperation (DC) experience (2.2.7): not applicable
- Other (2.2.8): not applicable

Short-term expert pool: Developer with minimum 2, maximum 3 members

For the technical assessment, an average of the qualifications of all specified members of the expert pool is calculated. Please send a CV for each pool member (see below Chapter 7 Requirements on the format of the bid) for the assessment.

Tasks of the developer pool

- Development of the software modules
- Conduction of user research

Qualifications of the developer pool

- Education/training (2.6.1): 2 experts with university qualification (German 'Diplom'/Master or equivalent) in Computer Science, Software Engineering, Information Systems, Data Science, Computer Engineering or a comparable field relevant to software development. similar field
- Language (2.6.2): 2 experts with C1-level (CEFR) language proficiency in English
- General professional experience (2.6.3): 2 experts with 7 years of professional experience in the software development sector
- Specific professional experience (2.6.4): 2 experts with 5 years of professional experience in development of monitoring systems, 1 expert with 5 years of professional experience in the development of event management systems

- Regional experience (2.6.5): not applicable
- Development cooperation (DC) experience (2.6.6): not applicable

Short-term expert pool: Trainer with minimum 2, maximum 3 members

For the technical assessment, an average of the qualifications of all specified members of the expert pool is calculated. Please send a CV for each pool member (see below Chapter 7 Requirements on the format of the bid) for the assessment.

Tasks of the trainer pool

- Prepare training material on the requested features
- Deliver training on the requested features

Demonstrate functions and clarify introductory user questions.

Qualifications of the trainer pool

- Education/training (2.6.1): 2 experts with university qualification (German Diplom/Master or equivalent) in Development Studies, Political Science, Economics, Public Administration, Information Systems, Data Science, Monitoring and Evaluation or a comparable field relevant to the assignment.
- Language (2.6.2): 2 experts with C1-level (CEFR) language proficiency in English
- General professional experience (2.6.3): 1 expert with 3 years of professional experience in the software development sector
- Specific professional experience (2.6.4): 1 expert with 2 years of professional experience in the delivery of trainings for users of software products
- Regional experience (2.6.5): not applicable
- Development cooperation (DC) experience (2.6.6): not applicable

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

5. Costing requirements

In deviation to clause 9.3 of the EVB-IT Service Terms and Conditions remuneration shall be due in three-month-intervals as defined in the Contract Award Letter.

Licenses

The bidder shall specify the pricing model for the provision and operation of the software modules offered as a Software-as-a-Service (SaaS) solution. The price model may include, for example, user-based licences, workspace-based pricing, or a platform-based fee and should clearly indicate which services are included (e.g. hosting, maintenance, updates, technical support).

For the purpose of comparability of financial offers, bidders shall calculate their price based on the estimated usage described below. The bidder shall explain in the price sheet which cost components are included in the proposed pricing model.

To enter into the column “explanations” in the Price schedule:

Costs for provision of access to the project monitoring software for an estimated number of 23 concurrent users for a period of 12 months.

Costs for provision of access to the event management software for 23 an estimated number of concurrent users for a period of 12 months.

The bidder shall indicate clearly whether the proposed price includes hosting, maintenance, updates, user support and other operational services related to the SaaS solution.

All fees will be paid in Euro.

Specification of inputs:

Fee days	Number of experts	Total	Comments
Designation of TL	1	16	All days done in the country of residence of the expert
Designation of TL/key expert	1	40	All days done in the country of residence of the expert
Short-term expert pool: Developer	3	150	All days done in the country of residence of the expert
Short-term expert pool: Trainer	2	20	All days done in the country of residence of the expert
Other costs	Number	Total	Comments
Flexible remuneration	1	10 000	A budget of EUR 10000 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.
Licences for project monitoring software to monitor aggregated	23		
Licences for software to monitor events	23		

Trainings (all to be conducted online):

The contractor implements the following online workshops/training courses:

- Onboarding into the software modules
- Feedback from the usage of the software modules

6. Inputs of GIZ or other actors

GIZ and/or other actors will make the following available:

- Coordination with implementing partners
- Background information of the implementing partners as required
- APIs of skill-tagging software

7. Requirements on the format of the tender

The structure of the tender must correspond to the structure of the ToRs. 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.

The complete tender should not exceed 10 pages (excluding CVs). 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.

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.

8. Data protection

8.1 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 Annex “*The development of a data processing system under the GDPR*”, to offer practical orientation to the contractor.

9. Annexes

- Annex 1 - Identified business processes CEPAL-DEK Cluster
- Annex 2 – Data entities, business rules and user stories of the CEPAL-DEK Cluster's projects Monitoring and Event Management System
- Annex 3 – The development of a data processing system under the GDPR
- Annex 4 – GIZ-Information-Security-Annex- MINJUST
- Annex 5 – PaGoDA for Cofinanced projects
- Annex 6 User stories rules observations CEPAL-DEK Cluster