

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

CONFIDENTIAL

Delivering expert services on Marine Spatial Planning in South Africa and Namibia and the Benguela Current Large Marine Ecosystem

**Project number/
cost centre:
G-012229-307**
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10020340**

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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

The Blue Benguela Current Action (BBCA) is a multi-donor initiative jointly co-financed by the European Union (EU) and the German Federal Ministry for Economic Cooperation and Development (BMZ) and implemented by GIZ as part of the BMZ Global Programme “Sustainable Aquatic Food”. The project aims to contribute to an inclusive and sustainable Blue Economy in the Benguela Current Large Marine Ecosystem (BCLME) through the integrated conservation and sustainable use of marine and coastal biodiversity and the ecosystem goods and services it provides to societies in the region.

The BCLME extends along the south-western coast of Africa from the east of the Cape of Good Hope in South Africa along the Namibian coast towards the Angola Front. As one of the world’s four major coastal upwelling ecosystems, it is characterized by exceptionally high biological productivity and marine biodiversity. The ecosystem provides a wide range of socio-economic benefits, including fisheries, tourism, maritime transport, and other ocean-based economic activities that support the livelihoods of coastal communities in Angola, Namibia and South Africa.

Regional cooperation in the management of the BCLME is facilitated through the Benguela Current Convention (BCC), an intergovernmental organisation established through a treaty signed by Angola, Namibia and South Africa in 2013. The BCC promotes the sustainable management of shared marine resources and ecosystems through coordinated regional governance mechanisms and technical cooperation among the three member states.

Within this regional context, Marine Spatial Planning (MSP) has emerged as a key governance tool for balancing the sustainable use of marine resources with biodiversity conservation. MSP supports evidence-based, inclusive and participatory decision-making by allocating marine space to different uses while minimizing conflicts between sectors and safeguarding ecosystem health and integrity. This requires structured and continuous engagement of government institutions, private sector actors, civil society and coastal communities throughout the planning and decision-making process.

Both South Africa and Namibia have made significant progress in establishing national MSP frameworks. In South Africa, the Marine Spatial Planning Act (Act No. 16 of 2018) provides the legal foundation for MSP and establishes a regulatory framework for marine spatial planning in the country. The National Marine Spatial Planning Framework, published in 2021, sets out the institutional arrangements and procedures for the preparation, implementation and revision of Marine Area Plans. In accordance with the MSP Act, sector authorities are responsible for preparing Marine Sector Plans, which serve as key inputs for the development of Marine Area Plans such as the Western Marine Area Plan.

In Namibia, a National Framework for Marine Spatial Planning has been developed to guide the establishment of MSP processes and the preparation of marine spatial plans. The Central Marine Spatial Plan (CMSP) represents an important milestone in Namibia’s MSP process and provides a foundation for further spatial planning efforts, including the development of additional marine spatial plans for other parts of Namibia’s marine domain. Strengthening the institutional and legal basis for MSP remains an important step to ensure the effective implementation of marine spatial plans.

Through the Blue Benguela Current Action, GIZ supports MSP processes in Namibia and South Africa as well as regional cooperation on MSP under the Benguela Current Convention. This includes support to National Working Groups (NWGs) for Marine Spatial Planning in both countries and to the Regional MSP Working Group of the BCC, which

serves as a platform for exchange, coordination and alignment of MSP approaches across the BCLME.

Given the increasing complexity of MSP processes, including the need to integrate multiple sector interests, incorporate biodiversity and climate considerations, and ensure inclusive and effective stakeholder participation across governance levels, targeted technical advisory support is required. The present assignment aims to provide strategic and technical expertise to support the ongoing development and implementation of MSP processes in Namibia and South Africa, while also contributing to the regional harmonisation of MSP approaches within the Benguela Current Large Marine Ecosystem.

Through the provision of strategic and technical advisory services, the assignment is expected to contribute to the following results:

- Strengthened technical and institutional capacity of the National Working Groups for Marine Spatial Planning in Namibia and South Africa to advance MSP processes.
- Improved coordination and inclusive dialogue among sector authorities and stakeholders involved in marine spatial planning, including through technical advisory support to the development of Marine Sector Plans and Marine Area Plans.
- Progress in the development and expansion of marine spatial plans in Namibia, including preparations for the Northern and Southern Marine Spatial Plans.
- Progress in the development of Marine Area Plans in South Africa, including preparations for the Western Marine Area Plan.
- Strengthened legal and institutional framework for Marine Spatial Planning in Namibia, including consideration of options for a statutory basis for MSP.
- Improved integration of biodiversity conservation and climate resilience considerations into Marine Spatial Planning processes.
- Strengthened regional cooperation and alignment of MSP approaches within the Benguela Current Large Marine Ecosystem through the Benguela Current Convention.

2. Tasks to be performed by the contractor

The contractor will provide technical advisory services and facilitation support to the Marine Spatial Planning (MSP) processes in South Africa and Namibia, as well as to the regional MSP coordination under the Benguela Current Convention (BCC).

The advisory services will primarily target the following institutions:

- the inter-ministerial and inter-sectoral National Working Groups (NWGs) and steering Committee for Marine Spatial Planning in South Africa and Namibia, consisting of representatives from government ministries including the technical and political level, research institutions, and civil society organisations;
- the MSP Secretariat and relevant national authorities responsible for MSP implementation in South Africa and Namibia;
- the Regional MSP Working Group under the Benguela Current Convention (BCC).

Nature of the assignment:

- The assignment is of an advisory and facilitation nature. The contractor shall provide strategic, technical and procedural advice to the relevant national and regional MSP structures and support coordination, dialogue and technical inputs to ongoing Marine Spatial Planning processes.

- Responsibility for decision-making, policy development and the formal adoption and implementation of marine spatial plans remains with the competent national authorities and institutional structures, including the respective National Working Groups for Marine Spatial Planning and the Benguela Current Convention structures.

The contractor is therefore expected to provide expert guidance, analytical inputs and facilitation support, while ensuring that national ownership of MSP processes in Namibia and South Africa and regional coordination under the Benguela Current Convention are maintained. The contractor shall ensure that participatory and inclusive approaches are applied across all advisory services and MSP processes supported under this assignment.

The contractor is responsible for providing the following services:

2.1 Strategic MSP advisory and policy support

The contractor shall provide strategic and technical advisory support on the development and implementation of Marine Spatial Planning processes in South Africa and Namibia.

This includes:

- Advising the National Working Groups and high level steering committees for Marine Spatial Planning in South Africa and Namibia on the development and implementation of MSP processes.
- Providing technical advice on the implementation of national MSP frameworks in both countries.
- Providing guidance on the implementation of MSP in South Africa in accordance with the Marine Spatial Planning Act (No. 16 of 2018).
- Advising the Government of Namibia and the MSP National Working Group on the development of a legal basis for MSP, including options such as a dedicated MSP Act, amendments to existing legislation, or policy instruments.
- Providing advice on institutional arrangements and sustainable financing mechanisms for the implementation of approved marine spatial plans.
- Benchmarking MSP approaches in Namibia and South Africa against international best practices, including relevant guidance from the Intergovernmental Oceanographic Commission of UNESCO (IOC-UNESCO) and other international MSP frameworks.
- Advising on the integration of biodiversity conservation and climate resilience considerations into MSP processes (“biodiversity-inclusive and climate-smart MSP”).

2.2 Technical support for MSP processes and plan development

The contractor shall provide technical advisory inputs to the development and refinement of marine spatial/area plans and sector plans in Namibia and South Africa.

This includes:

- Supporting the development of Marine Spatial Plans in Namibia, in particular the Northern and Southern Marine Spatial Plans, in line with the National Framework for Marine Spatial Planning and the Regional MSP Strategy of the Benguela Current Convention.
- If requested by the government, support the revision and updating of the Central Marine Spatial Plan
- Supporting the expansion of the spatial coverage of Marine Spatial Plans in Namibia and South Africa (Western Marine Area Plan).
- Providing advisory support to the development of the Mineral Resources Marine Sector Plan in South Africa, including:

- supporting the Department of Mineral Resources and Energy (DMRE) and the MSP Secretariat;
 - supporting the structuring and technical review of the sector plan;
 - advising on the identification of spatial priorities based on available data and ensuring a balanced approach to sectoral spatial demands.
- Providing expertise on the incorporation of climate-smart planning approaches into the Western Marine Area Plan in South Africa.
- Supporting the development of roadmaps for the preparation of additional marine spatial/area plans in Namibia and South Africa.

2.3 Support for MSP governance and coordination structures

The contractor shall provide advisory support to MSP governance and coordination mechanisms at national and regional levels.

This includes:

- Providing advisory support to the Regional MSP Working Group of the Benguela Current Convention to promote alignment and harmonisation of MSP approaches within the Benguela Current Large Marine Ecosystem.
- Providing advisory support to the MSP Secretariat/ lead Ministry to prepare for the engagement with the high-level structures or steering committee in Namibia and South Africa.
- Advising MSP governance structures on integrating stakeholder participation into decision-making processes, including linkages between technical working groups and broader stakeholder consultations.
- Supporting the work of the National Working Groups for MSP in Namibia and South Africa, including at:
 - quarterly MSP NWG meetings in both countries;
 - monthly virtual MSP NWG meetings in South Africa;
 - virtual meetings of the MSP NWG Namibia.

2.4 Stakeholder engagement and capacity development

The contractor shall support stakeholder participation and capacity development related to MSP processes.

This includes:

- Providing guidance on participatory planning processes, including stakeholder mapping, engagement strategies and consultation formats.
- Support negotiation phase during the planning process with external government stakeholders
- Provide advisory support to ensure inclusive participation, including representation of relevant stakeholder groups such as coastal communities, small-scale fisheries and civil society.
- Supporting the roll-out of stakeholder engagement meetings organised through the respective MSP National Working Groups.
- Supporting the design, facilitation and documentation of capacity-building retreats for MSP National Working Groups.

2.5 Support to plan adoption and implementation

The contractor shall provide advisory support to processes aimed at the formal adoption and implementation of marine spatial plans.

This includes:

- Providing advisory support for the submission of technically approved spatial plans (e.g. the Namibian Central Marine Spatial Plan) to the respective authorities for decision-making and adoption.

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
Participation in MSP National Working Group (NWG) meetings in South Africa	July 2026, August 2026 (retreat), October 2026, four meetings in 2027 and one meeting in 2028
Participation in MSP National Working Group (NWG) meetings in Namibia	Quarterly as agreed with MSP NWG
Inception report outlining the advisory approach, priority MSP processes in Namibia and South Africa, and coordination modalities with MSP Secretariats and NWGs	Within 6 weeks after contract start
Roadmap for the further development of Marine Spatial/Area Plans in Namibia and South Africa prepared and agreed with the respective National Working Groups	September 2026
Concept for Capacity Building Retreat for MSP NWG South Africa developed and agreed with MSP Secretariat South Africa and GIZ	June 2026
Capacity Building Retreat planned, implemented and documented	Retreat: 16-22 August 2026; documentation by 15 October 2026
Advisory note outlining legal options for establishing a statutory basis for MSP in Namibia (e.g. MSP Act, amendments to existing legislation, or policy instruments)	November 2026
Technical advisory inputs for the development of the South African Mineral Resources Marine Sector Plan, including review comments and recommendations to DMRE and MSP Secretariat	December 2026

Advisory inputs provided to the regional MSP Working Group of the Benguela Current Convention and recommendations for regional MSP harmonisation documented	Q2 2027
Advisory recommendations and tools for inclusive stakeholder engagement and participatory planning processes in MSP prepared and shared with respective NWGs	Q3 2027
Final advisory report summarising key recommendations for strengthening MSP implementation in Namibia and South Africa and lessons for regional MSP cooperation under the Benguela Current Convention	January 2028

Period of assignment: from Beginning of June 2026 until 31.01.2028.

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). 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 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 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).

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**.

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.

Key expert

Tasks of the key 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 the key expert

- Education/training (2.1.1): university degree (German ‘Diplom’/Master) in Conservation, Zoology and Geography, or a related field
- Language (2.1.2): C1-level language proficiency in English
- General professional experience (2.1.3): 10 years of professional experience in marine spatial planning is essential
- Specific professional experience (2.1.4): 8 years in advising several ministries and government institutions on marine spatial planning processes
- Regional experience (2.1.6): 7 years of experience in projects in Southern Africa (region), of which 5 years in projects in Namibia and South Africa (country)
- Development cooperation (DC) experience (2.1.7): 5 years of experience in DC projects
Other experience (2.1.8): 7 years of professional experience in trans-national cooperation on trans-boundary MSP

Soft skills

In addition to the key expert qualifications, the following soft skills are required:

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

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 2026 \(GERMAN ONLY\)](#)).

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

Please note that this is a tender below the EU-threshold. Offers above EUR 216.000 (Main service + Option) cannot be considered.

Fee days	Number of experts	Number of days per expert	Total	Comments
Designation of TL/key expert/short-term expert pool	1	110	110	Working up to 70 days in the BCC region and up to 40 days remote
Travel expenses	Quantity	Number per expert	Total	Comments
Per-diem allowance in country of assignment (Namibia)	1	35	35	
Overnight allowance in country of assignment (Namibia)	1	35	35	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

				<p>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>
Per-diem allowance in country of assignment (South Africa)	1	30	30	each quarter trips are expected to South Africa and Namibia, specific dates will be clarified with partners at a later stage
Overnight allowance in country of assignment (South Africa)	1	30	30	
Per-diem allowance in country of assignment (Angola)	1	5	5	For a regional meeting a flight within the region to Angola is expected, specific dates will be clarified with partners at a later stage
Overnight allowance in country of assignment (Angola)	1	5	5	
Transport	Quantity	Number per expert	Total	Comments
International flights	1	8	8	Travel to the place of service delivery Namibia and South Africa
International regional flights	1	8	8	Flights within the BCC region (between AGO, NAM and ZAF) during service delivery
CO₂ compensation for air travel	1	16	Up to 1,600 EUR	A fixed budget of EUR 1,600 EUR is earmarked for settling carbon offsets against evidence. (8 x 140.00 EUR + 8 x 60.00 EUR).
Travel expenses (train, car)	1	8	Up to 800 EUR	Travel within the country of assignment, transfer to/from airport etc.
Other travel expenses	1	8	Up to 792 EUR	e.g. visa costs, airtime (internet package), vaccination etc.

6. Inputs of GIZ or other actors

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

- Logistics for workshops and meetings, incl. venue, catering and allowances for participants as per GIZ rules and regulations

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.

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 CV 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 CV shall not exceed 4 pages. It must clearly show the position and job the proposed person held in the reference project and for how long.

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. Option

After the services put out to tender have been completed, important elements of these tasks can be continued or extended. Specifically:

Type and scope

The contractor is responsible for providing the following optional services:

- Continuation of advisory services as per chapter 2 to the Namibian and South African MSP National Working Groups and the regional MSP working group under the BCC.
- Participating and supporting additional national (Namibia and South Africa) and/or regional (BCC) MSP WG meetings in 2028 (4 trips to the region are planned).

Requirements

Exercising the option will depend on commissioning of extension or follow-on phase by GIZ's commissioning party and the positive assessment of interim results of the original commission. The decision on continuation is expected to be made in the period between October and December 2027. If the option is exercised, it is anticipated that the contract term will be extended to 31.10.2028.

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

Fee days	Number of experts	Number of days per expert	Total	Comments
Designation of key expert	1	40	40	working up to 20 days in the BCC region and up to 20 days remote
Travel expenses	Quantity	Number of days per expert	Total	Comments
Per-diem allowance in country of assignment (Namibia)	1	10	10	each quarter trips are expected to South Africa and Namibia, specific dates will be clarified with partners at a later stage
Overnight allowance in country of assignment (Namibia)	1	10	10	<p>Overnight stays abroad:</p> <p>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 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>
Per-diem allowance in country of assignment (South Africa)	1	10	10	
Overnight allowance in country of assignment (South Africa)	1	10	10	<p>Overnight stays abroad:</p> <p>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 for reimbursement on a lump-sum basis.</p>

				Please indicate in the price schedule whether your offer is on a lump-sum basis or against evidence.
Transport	Quantity	Number of days per expert	Total	Comments
International flights	1	4	4	Travel to the place of service delivery in South Africa and Namibia
International regional flights	1	4	4	Flights within the BCC region(between AGO, NAM and ZAF) during service delivery
Carbon offsets for flights	1	8	Up to 800.00 EUR	A fixed budget of EUR 800.00 (4 x 140.00 EUR + 4 x 60.00 EUR) is earmarked for settling carbon offsets against evidence.
Travel expenses (train, car)	1	4	Up to 400 EUR	Travel within the country of assignment, shuttle to/from airport etc.
Other travel expenses	1	4	Up to 396 EUR	e.g. visa costs, airtime (internet package), vaccinations

Requirements on the format of the tender for the option

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