

Terms of reference (ToRs) for the procurement of services above the EU threshold

CONFIDENTIAL

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Subject of the tender procedure:

Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

0.	List of abbreviations	3
1.	Context.....	5
1.1.	Regional context in the face of climate change and biodiversity loss	5
1.2.	EU-LAC cooperation for a green and just transition aligned with Global Gateway	5
1.3.	Introduction to Euroclima.....	6
2.	Tasks to be performed by the contractor	9
2.1.	Term, general information and scope of responsibility	10
2.2.	Objectives, indicators, work packages, milestones	11
2.4.	Project and knowledge management requirements	16
2.5.	Data protection and information security	18
2.6.	Other requirements	18
3.	Technical-methodological concept	18
3.1.	Interpretation of objectives (section 1.1 of the assessment grid).....	18
3.2.	Processes and actors in the partner system (section 1.2 of the assessment grid)	19
3.3.	Strategy (section 1.3 of the assessment grid).....	19
3.4.	Project management (section 1.4 of the assessment grid)	21
3.5.	Further requirements (section 1.5 of the assessment grid).....	22
4.	Personnel.....	22
5.	Costing requirements	41
5.1.	Assignment of experts.....	41
5.2.	National administrative staff	43
5.3.	Travel expenses.....	43
5.4.	Materials and equipment	44
5.5.	Operating costs in the country of assignment	44
5.6.	Workshops, education and training	44
5.7.	Local contributions	44

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy



Transaction number: 7000001450

- 5.8 Other costs.....45
- 5.9 Flexible remuneration item45
- 6. Requirements on the format of the tender45
- 7. Options or follow-on contract.....46
- 7.1 Option to expand the service content/extend the contract term pursuant to section 132 (2) no. 1 German Act against Restraints of Competition (GWB).....46
- 7.2 Follow-on contract pursuant to Section 14 (4) no. 9 German Ordinance on the Award of Public Contracts (VgV).....46
- 8. Additional Documents47

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

0. List of abbreviations

AECID	Agencia Española de Cooperación Internacional para el Desarrollo
AfD	Agence Française de Développement
BMZ	Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung
CAF	Corporacion Andina de Fomento
CAP	Country Action Plan
CEFR	Common European Framework of Reference for Languages ¹
DG INTPA	Directorate General International Partnerships
DRR	Disaster Risk Reduction
ECLAC	Economic Commission for Latin America and the Caribbean
EF	Expertise France
EIB	European Investment Bank
EU	European Union
EUD	European Union Delegation
FIAP	Fundación Internacional y para Iberoamérica de Administración y Políticas Públicas
GCF	Green Climate Fund
GDP	Gross Domestic Product
GEF	Global Environment Facility
GGIA	Global Gateway Investment Agenda
GHG	Greenhouse gases
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
LAC	Latin America and the Caribbean
LTS	Long-term Strategies
M&E	Monitoring and Evaluation

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

MIP	Multiannual Indicative Planning
NAP	National Adaptation Plan
NbS	Nature-based Solutions
NBSAP	National Biodiversity Strategies and Action Plans
NDICI	Neighbourhood, Development and International Cooperation Instrument
NDC	Nationally Determined Contribution
NFP	National Focal Point
ODA	Official Development Assistance
OECD	Organisation for Economic Co-operation and Development
RfS	Request for Service
RMO	Risk Management Office
TEI	Team Europe Initiative
ToRs	Terms of reference
UN	United Nations
UN-DESA	UN Department of Economic and Social Affairs
UNDP	United Nations Development Programme
UNEP	United Nations Environment Programme

Transaction number: 7000001450

1. Context

1.1. Regional context in the face of climate change and biodiversity loss

The world is undergoing a planetary crisis marked by the interlinked challenges of climate change, biodiversity loss, and environmental degradation. Globally, approximately 70% of species are at risk of extinction due to habitat loss, climate disruption, and invasive species, and the impacts of pollution, which degrades air, land, freshwater, and marine ecosystems.

While Latin America and the Caribbean (LAC) contribute about 10% of global greenhouse gas emissions, it is among the most exposed and vulnerable to the impacts of climate change and environmental degradation. Over the past two decades, climate-related disasters in the region have claimed more than 312,000 lives and affected over 277 million people. Geographically, LAC includes extensive coastlines, low-lying islands, arid zones, tropical rainforests, and mountainous regions - ecosystems and landscapes particularly sensitive to climate-related disruptions such as sea-level rise, hurricanes, droughts, and glacier retreat.

The economic cost of climate impacts is estimated to exceed 2% of the region's annual GDP. Its economy remains reliant on the extraction and export of natural resources, driving deforestation, land degradation, water contamination, and loss of biodiversity and making the region particularly sensitive to environmental shocks and global market volatility. LAC countries require large-scale investments to reduce emissions and to adapt to the impacts of climate change. Meeting climate goals in the region will require substantial investment, ranging from 7% to 19% of GDP by 2030 (equivalent to US\$470 billion to US\$1,300 billion). Public finance will not be sufficient to address the problem, which is why mobilizing private sector finance will be required to meet these needs.

Socioeconomically, women, Indigenous peoples, Afro-descendants, and rural populations, remain especially vulnerable to environmental risks, as many live in poverty or informality, often in precarious urban settlements with limited access to resilient infrastructure, basic services, and social protection.

1.2. EU-LAC cooperation for a green and just transition aligned with Global Gateway

The partnership between the European Union (EU) and LAC has acquired renewed strategic significance, as the regions account for more than a third of UN membership and approximately 22% of Global GDP, and the EU remains the largest investor in LAC and its third trade partner. As a key donor, investor, and political partner, the EU is well positioned to support this transformation through policy, financial, regulatory and technical cooperation instruments. Through Team Europe initiatives, bringing together a wide range of actors, scalable and context-sensitive solutions can be jointly promoted. Maximizing the impact of this partnership requires continued attention to equity, capacity-building, and access to finance, especially for those populations most affected by the climate crisis and least responsible for causing it.

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

The Global Gateway is key as the EU's strategy to promote smart, clean and secure connections in digital, energy and transport sectors, while strengthening health, education and research systems worldwide. Hereby, it follows a 360 degrees approach focused on reducing socio-economic inequalities, particularly for vulnerable groups, ensuring that the benefits of the green transition are accessible to all, helping to minimize negative externalities and allowing marginalized groups to actively participate.

Through the Global Gateway Investment Agenda (GGIA) and the EU-CELAC Joint Declaration adopted at the 2023 Summit, the EU and LAC have reinforced this joint approach by identifying investment opportunities in key sectors of the green and digital transition in a shared political roadmap to mobilize investments in key sectors—such as clean energy, climate resilience, digital infrastructure, sustainable agriculture, raw materials and biodiversity conservation. Both regions have been identifying just, green, and digital investment opportunities, addressing investment gaps, which will benefit from the open and non-discriminatory environment generated by trade and investment agreements.

1.3. Introduction to Euroclima

Euroclima plays a central role in advancing the EU–LAC strategic partnership by concretely contributing to the EU–LAC GGIA. As the flagship regional programme of the EU for climate and environmental action in LAC, Euroclima provides a critical platform to support the implementation of shared commitments to jointly address climate change and biodiversity loss. It seeks to contribute to a sustainable, resilient and inclusive transition through climate mitigation and adaptation efforts, including the protection, restoration, conservation of biodiversity as well as the promotion of a circular economy. To this end it focuses on contributing to the enabling conditions needed towards a green and just transition. It provides crucial expertise, technical assistance, and policy dialogue to partner countries, facilitating the integration of sustainability measures and advancing the GGIA's mission. Euroclima helps bridge capacity and funding gaps, playing a vital role in achieving GGIA's ambitious targets and in increasing access to finance and investments.

Building on lessons learned from its earlier phases, Euroclima has evolved into a flexible and adaptive regional programme. Originally launched in 2010 and expanded during 2017-2023 as EUROCLIMA+, the Programme initially supported 18 participating Latin American countries in the implementation of their Nationally Determined Contributions (NDCs) under the Paris Agreement. It is in the current phase (2023-2027), that also Caribbean countries and aspects related to biodiversity and circular economy were included in what is now known as Euroclima, covering in total 33 countries in LAC. Currently, the contract “Euroclima Global Gateway” (2027-2028) is being prepared and will provide additional resources and alignments to consider for the implementing agencies of the Programme, including GIZ.

Euroclima is co-financed by the EU's Directorate-General for International Partnerships (DG INTPA) and the German Federal Ministry for Economic Cooperation and Development (BMZ).

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

Implemented under a Team Europe approach, Euroclima is implemented through coordinated efforts by eight organizations: the Spanish Agency for International Development Cooperation (AECID); the AFD Group, including Agence Française de Développement (AFD) and Expertise France (EF), although AFD will conclude its participation in 2026; the Economic Commission for Latin America and the Caribbean (ECLAC); the Fundación Internacional y para Iberoamérica de Administración y Políticas Públicas (FIAP); the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH; the United Nations Environment Programme (UNEP); and the United Nations Development Programme (UNDP). The Programme is co-funded by the EU and the German Federal Government.

Thematic scope

Based on the experience accumulated so far and the EU-LAC GGIA priorities, Euroclima’s continued intervention focuses on eight priority areas, reflecting comprehensive approaches to challenges related to climate change, biodiversity loss and environmental degradation. The Programme seeks to implement scalable transformative actions in sustainable energy, sustainable transport, bioeconomy and resilient food production, biodiversity, ecosystems and nature-based solutions, disaster management and risk reduction, circular economy and sustainable water management. In the following, the relevant areas of intervention for the services laid out in this tender are introduced along with the governance and implementation processes of the Programme.

<p>Sustainable climate finance and private sector engagement</p> <p>Increased accessibility of sustainable financing</p> <ul style="list-style-type: none"> ✓ Capacity development, ✓ Promotion of innovative instruments and sustainable investments; ✓ Enhancing policy coherence, ✓ Bankable projects 	<p>Sustainable energy</p> <p>Promoting renewable energy sources, improving energy efficiency, and supporting the decarbonization of the energy sector</p> <ul style="list-style-type: none"> ✓ Hydrogen, ✓ Storage, ✓ Interconnection, ✓ Market integration 	<p>Bioeconomy and sustainable food production</p> <p>Capacity strengthening to increase the climate resilience of agricultural and livestock production systems</p> <ul style="list-style-type: none"> ✓ Identification of non-timber forest products for industrial uses, ✓ Value-chain strengthening, ✓ Cooperation with the private sector and investment opportunities 	<p>Sustainable transport</p> <p>Promoting sustainable and efficient transport systems and the adoption of clean and low-emission solutions</p> <ul style="list-style-type: none"> ✓ Urban mobility plans ✓ Electric mobility ✓ Active mobility
<p>Biodiversity, ecosystems, and nature-based solutions</p> <p>Promoting the Climate-Biodiversity-Society nexus, emphasising a holistic approach to design, implement, analyse, monitor and mainstream biodiversity focus into sectorial policies</p> <ul style="list-style-type: none"> ✓ Innovative approaches, incl NbS and EbA ✓ Economic valuation of ecosystem services ✓ Financial mechanisms and green and blue carbon markets 	<p>Circular economy</p> <p>Supporting the adoption of circular practices in key sectors such as agriculture, manufacturing, and waste management</p> <ul style="list-style-type: none"> ✓ Sargassum ✓ Collaboration and partnerships with other development partners, governments, the private sector, civil society, academia, and financial institutions 	<p>Disaster risk reduction</p> <p>Building climate and social resilience in LAC countries by strengthening national adaptation and DRM strategies, plans and measures to protect vulnerable communities and ecosystems in the face of climate impacts</p>	<p>Sustainable water management</p> <p>Ensuring the availability of water resources under the framework of integrated water management and transboundary jurisdictions, the sustainability of drinking water supply services in areas located in zones exposed to climate change</p>

- Sustainable transport: Euroclima supports the transition to sustainable urban mobility across LAC, aiming to reduce greenhouse gas emissions and enhance equitable access to transport. Through technical cooperation, policy advisory, and the promotion of pilot interventions, it plays a central role in fostering low-carbon mobility systems that prioritize urban resilience and are integrated with national climate policies.

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

- Sustainable energy: Euroclima supports partner countries in building resilient, low-carbon energy systems. This involves strengthening energy governance, accelerating the deployment of renewables, enhancing energy efficiency, and promoting emerging technologies like green hydrogen through tailored technical and policy, aiming to foster both emissions reductions and energy access.
- Climate finance and private sector engagement: Euroclima works to create enabling environments for scaling climate finance through institutional strengthening, strategic planning, and support to access international funds. These actions bridge climate ambition with financial implementation, fostering both public and private investment.
- Biodiversity, ecosystems and nature-based solutions: Euroclima promotes ecosystem-focused actions focused on conservation, restoration, and sustainable use, often working with indigenous peoples and local communities. These actions strengthen resilience, safeguard biodiversity, and contribute to achieving national climate goals.
- Bioeconomy and resilient food production: Euroclima supports climate-smart agriculture, sustainable livestock management, and bioeconomy development. Its actions aim to reduce emissions from the agri-food sector, increase productivity of value chain, improve livelihoods, and promote land restoration.
- Sustainable water management: Euroclima implements actions that promote climate-resilient water governance, sustainable watershed management, and nature-based solutions. Its water-related actions also support equitable access to water and strengthen local capacities to manage water risks in a changing climate.
- Disaster Risk Management: Euroclima contributes to the integration of disaster risk reduction into climate action by enhancing early warning systems, promoting risk-informed planning, and applying ecosystem-based approaches. These actions target sectors and regions highly vulnerable to climate-induced hazards, focusing on building systemic resilience.
- Circular Economy: Euroclima supports countries in adopting circular economy models that reduce environmental footprints, enhance resource efficiency, and support climate mitigation, promoting regulatory innovation, sustainable business development, and circular industrial practices.

In addition, the Programme has put a focus on certain cross-cutting action lines, including climate-related policies plans and institutions; access to finance and investment (enabling frameworks, institutional capacities, access to and instruments for climate change finance and investment); transparency and accountability of climate policy and NDC implementation; coordination among sectors, between government levels and multiple stakeholders; strengthened capacities for Action for Climate Empowerment agenda; and a gender perspective and participation of vulnerable groups, such as indigenous groups.

GIZ focuses its contribution to Euroclima programme particularly in the following areas: sustainable mobility, energy transition, decarbonization in the industry, public and private climate finance, bioeconomy, biodiversity and nature-based solutions, circular economy; as well as in the following action lines: climate-related policies plans and institutions; access to

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

finance and investment; and multi-actor and multi-sectorial coordination, which are implemented with a focus on climate governance internally.

Governance and methodological approach

Since its beginnings, Euroclima has continuously adapted itself and its processes to define actions to be implemented and areas of work to needs brought by the partner countries, as well as to the relevant EU strategies.

In addition, some EU Delegations in LAC have identified potential TEIs in climate change and biodiversity, some of which are implemented through so-called Country Windows in Argentina, Brazil, Chile, Costa Rica, Mexico, Panama and Uruguay focused on providing targeted, in-depth, and comprehensive technical assistance to selected partner countries.

Target groups

Euroclima is active in 33 countries in LAC, each with different themes and priorities. It focuses on strengthening the capacities of intermediaries who in turn reach a broad population and hence primarily addresses employees in the ministries of the countries, e.g. from climate, environment, finance, planning and others, development banks as well as representatives of the private sector, NGOs and academia. In addition to the national level, it also considers sub-national structures, such as staff in city and municipal administrations and regional institutions.

The target groups that are ultimately reached by the measures are the local population in cities and rural regions. Indigenous groups also play an important role and should be given special consideration and integrated into the decision-making processes. In all activities, attention is paid to the Leave No One Behind principle of the 2030 Agenda and gender equity. The latter is to be guaranteed by proactively promoting the participation of women and corresponding national gender bodies as part of the planning and implementation of measures.

2. Tasks to be performed by the contractor

Overall, this assignment aims to provide ad hoc multi-sectoral technical assistance for a green and just transition in LAC in line with the EU Global Gateway Strategy and in the areas of implementation of GIZ within the Euroclima Programme, which up to date focus on sustainable energy, sustainable transport, bioeconomy and resilient food production, biodiversity, ecosystems and nature-based solutions, and circular economy in the Caribbean, but in the future do not exclude disaster management and risk reduction and sustainable water management to meet the Programme's needs.

Consistent with Euroclima's potential role as a strategic knowledge and regional facilitator for like-minded initiatives, the requested services may also contribute to the achievement of objectives and indicators of related programs through collaborating with other programs in the region.

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

2.1. Term, general information and scope of responsibility

The expected term of the contract for services must be specified in the 'Special terms and conditions of contract'. The definitive term and service delivery period are set out in the contract award notification. The contract is anticipated from autumn 2026 until the end of 2028.

The contractor needs to deliver services linked to the objectives of Euroclima and defined work packages as described in section 2.2. The specification of Work Packages provides an outline of the main lines of service that may be requested according to the best available knowledge as of today. The Work Packages present a general framework for the potential work to be implemented and should thus be taken as indicative.

The contractor is expected to demonstrate sufficient adaptability to adjust the work plan and scope of activities in response to evolving support needs from GIZ and its partners, particularly INTPA and BMZ. To enable an agile response, close coordination and consultation with GIZ are essential. The proposed experts must be capable of working flexibly and of actively contributing to change processes in collaboration with GIZ.

GIZ will steer the implementation of the contract from Belgium. With that in mind, it is expected that the contractor is generally available to interact with Euroclima for a large part of LAC and Central European working hours. The working languages of Euroclima are English and Spanish. The communication language between the contracting authority and the contractor will hence be either English or Spanish.

Request for Service (RfS)

To make sure technical capacities are available when needed and to maintain a stable and predictable workload, any emerging service needs will be discussed at an early stage and jointly scheduled. A suitable management procedure for this coordination is to be agreed upon at the outset of the contract. This collaborative approach underpins the timely and effective delivery of support.

To facilitate this flexible approach and ensure efficient resource planning, implementation, and progress monitoring for each task, a formal Request for Service (RfS) will be provided by GIZ, outlining the exact scope of details of the required services. The RfS will allow the contractor and GIZ to agree on key specifications for each task in advance. An illustrative template can be found in the Annex. The following illustrates the process leading to the implementation of a new task. If needed, the approach may be adjusted by GIZ in consultation with the contractor during the assignment period.

1. GIZ/Euroclima provides a standardized RfS that describes the scope of required services for each task, including objectives and expected impact, foreseen activities and milestones, geographic focus, timeframe, estimated number of expert days, deliverables, measures to mainstream a gender and inclusion approach, and, if

Transaction number: 7000001450

- applicable, the preferred short-term experts. The contractor may be requested to provide inputs and/or develop first draft(s) of the RfS (e.g., of technical sections).
2. Through an iterative process, GIZ/Euroclima and the contractor work together to clarify and agree on the scope of work, incl. a breakdown of the expected number of days for each activity and deliverable, as basis for invoicing upon completion.
 3. GIZ/Euroclima and the contractor agree on the assignment of experts from the expert pools for task management and implementation, with clear roles and responsibilities.
 4. If the task requires the involvement of additional experts outside of the defined pools due to exceptional circumstances, the contractor shall identify suitable specialists in consultation with GIZ/Euroclima. GIZ/Euroclima may also recommend experts to be added to the pools. All added experts must meet the staffing concept defined for the original tender unless explicitly agreed otherwise and their assignment confirmed by GIZ/Euroclima in writing.
 5. After agreeing on the scope and delivery of the task, GIZ/Euroclima and the contractor sign the RfS, with any complementary information added in the annexes as needed.
 6. Within a maximum of 4 weeks after signing the RfS, the involved experts initiate task implementation, unless otherwise agreed. Throughout task implementation, the contractor coordinates regularly with GIZ/Euroclima for quality control. Inputs, intermediate outputs, and final deliverables are regularly presented for discussion, and adjustments are carried out as needed.
 7. GIZ/Euroclima confirms successful completion of tasks and milestones, if applicable. All deliverables, as defined in the RfS, are submitted to GIZ/Euroclima as soft copies no later than 2 weeks after task completion, unless otherwise specified.

2.2. Objectives, indicators, work packages, milestones

The description below provides an overview of the Euroclima logframe as contracted with BMZ for the current program funding cycle until March 2029 including overarching Euroclima module objectives, indicators and thematic output approach. The contractor is responsible for contributing to the achievement of the objectives and indicators described in this document.

The work packages and activities described are indicative only. First, it is currently not possible to specify tasks and allocation of expert days to the topics and tasks within the given work packages. Second, during project implementation the work packages may be further developed and updated according to partner needs. Depending on these, services might be requested for one or more of the defined work packages, or for additional work packages yet to be defined (*please also see chapter 7*). The individual tasks for all work packages will be defined in specific Requests for Service.

Module objective and indicators

Module objective:

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

Selected countries in LAC have introduced the implementation of transformative approaches to climate action, adaptation to climate change and biodiversity conservation.

Module objective indicator(s)

1. 150 out of 200 interviewed stakeholders from sectors suitable for systemic change processes confirm the application of learning experiences for transformative approaches to promote development geared towards climate change mitigation, adaptation to climate change and the conservation of biodiversity, each with a concrete example.
2. 15 countries have each adopted a new or revised national strategy for an inclusive and gender-responsive transition to development focussed on climate protection, adaptation to climate change or the protection of biodiversity.
3. 8 countries have incorporated a new or further developed scalable investment approach into their national programmes for the implementation of transformation measures for climate protection, adaptation to climate change or the preservation of biodiversity.

Output 1: Political and institutional framework conditions

Output 1: The political and institutional framework conditions are geared towards the implementation of transformative measures for climate action, adaptation to climate change and the preservation of biodiversity.

Output indicators:

- 1.1 Implementation plans for an inclusive and gender-equitable transformation in selected key areas were adopted in 15 countries.
- 1.2 A coordination mechanism with representatives from key areas for the further development of transformative processes or strategies was carried out in 16 countries.

Key activities for Output 1 – Work Package 1

- Strengthening governance mechanisms and cross-sectoral, multi-level and multi-stakeholder coordination platforms through the development of strategic competences, provision of technical advice and support where relevant.
- Providing technical and strategic advice to partners in the development and revision of regulations, rules, policies, implementation plans and strategies aligned with climate and biodiversity targets, considering gender equality and social inclusion.
- Developing and delivering capacity development measures (e.g. training, technical assistance, mentoring) on climate governance and biodiversity planning and facilitating peer exchange between institutions across LAC to share best practices.
- Contributing to the development of institutional capacities and enabling conditions that foster and enable access to both public and private climate finance and investment.

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

Milestones for work package 1	Delivery period
Ad-hoc support through regional national and/or subnational capacity development measures such as trainings and webinars to strengthen climate governance and enabling conditions carried out.	At all times, delivery within 1-2 months lead time, specific order clarification in regular meetings with backstopping
Ad-hoc peer-to-peer exchange spaces to strengthen climate governance and enabling conditions held.	At all times, delivery within 1-2 months lead time, specific order clarification in regular meetings with backstopping
Ad-hoc support through technical assistance measures such as policy briefs, studies, pathway analyses, work and implementation plans, drafting strategies and policies, etc.	At all times, delivery within 1-2 months lead time, specific order clarification in regular meetings with backstopping
Partial achievement of indicator 1.1	During the term established in the contract, until its end.
Partial achievement of indicator 1.2	During the term established in the contract, until its end.

Output 2: Scalable transformative sectoral measures

Output 2: Scalable transformative measures for climate action, adaptation to climate change and the preservation of biodiversity are available.

Output indicators:

- 2.1 For 30 measures defined in country dialogues, 60 % of which include elements to promote gender equality, which contribute to climate change mitigation, adaptation to climate change or biodiversity conservation, the responsible ministries of the countries confirmed that they include a scalable, transformative approach.
- 2.2 16 concepts for investment projects to promote development geared towards climate protection, adaptation to climate change and the conservation of biodiversity in selected countries in Latin America and the Caribbean were categorised as eligible for finance by financing institutions.

Key activities for Output 2 – Work Package 2

- Provision of technical expertise to implement transformative measures aimed, which include elements to promote gender equality and contribute to climate change mitigation, adaptation to climate change or biodiversity conservation.
- Co-developing scalable and replicable pilot projects in key sectors as described in section 1.3., providing technical expertise and support in their planning and implementation together with public and private partners, as well as expert support for concept notes and feasibility studies aligned with investment criteria of climate finance institutions.
- Delivering targeted trainings for public and private project developers on preparing climate/biodiversity project proposals ready for financing that include gender and social

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

inclusion considerations as well as support in the identification and mobilization of financial resource through matchmaking processes to mobilize co-financing and de-risking instruments with public and private partners.

Milestones for work package 3	Delivery period
Ad-hoc capacity development measures such as trainings and webinars for project developers on preparing ready project proposals in climate and biodiversity held.	At all times, delivery within 1-2 months lead time, specific order clarification in regular meetings with backstopping
Ad-hoc match-making spaces enabled to mobilize co-financing and de-risking instruments with public and private partners.	At all times, delivery within 1-2 months lead time, specific order clarification in regular meetings with backstopping
Ad-hoc support through technical assistance measures such as policy briefs, studies, pathway analyses, work and implementation plans, drafting strategies and policies, etc.	At all times, delivery within 1-2 months lead time, specific order clarification in regular meetings with backstopping
Partial achievement of indicator 2.1	During the term established in the contract, until its end.
Partial achievement of indicator 2.2	During the term established in the contract, until its end.

Output 3: Regional cooperation and knowledge exchange

Output 3: Regional cooperation at political and technical level on climate action, adaptation to climate change and biodiversity conservation has been strengthened.

Output indicators:

- 3.1 12 transnational cooperation programmes for climate protection, adaptation to climate change and development geared towards the preservation of biodiversity were implemented.
- 3.2 300 out of 400 participants (50% of them women) in regional exchange formats confirm the relevance of the learning experiences presented for their work on a scale of 1-5.

Key activities for Output 3 – Work Package 3

- Developing content-related contributions and organizational consulting services for the expansion of transnational multi-stakeholder networks and political dialogue formats addressing shared environmental challenges and supporting regional networks and communities of practice by providing technical facilitation and thematic inputs.
- Promoting peer-to-peer and other regional exchange and cooperation formats on framework conditions, transformative approaches and innovations in GIZ's key implementation areas and organizing and moderating webinars, regional fora and side-events at key regional or global conferences.

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

- Developing, processing and regionally disseminating via various channels regional knowledge products and case studies to promote replication and upscaling of transformative approaches and best practices.

Milestones for work package 3	Delivery period
Ad hoc peer to peer exchange formats facilitated	During the term established in the contract, until its end.
Ad hoc knowledge products created and socialized such as toolkits, guidelines, and factsheets	During the term established in the contract, until its end.
Partial achievement of indicator 3.1	During the term established in the contract, until its end.
Partial achievement of indicator 3.2	During the term established in the contract, until its end.

Activities in all Work Packages may be implemented in various ways and will be aimed at:

- Supporting the development of policies and plans of sustainable mobility and improving vehicle efficiency through technology.
- Supporting comprehensive energy transition processes by introducing renewable energies, energy efficiency measures; and focusing on access to reliable supply.
- Increasing access to and mobilization of climate finance; enabling the deployment of financial instruments and leveraging private sector investments.
- Implementing biodiversity strategies and plans, incl. National Biodiversity Strategies and Action Plans (NBSAPs); and promoting adaptation and resilience of communities.
- Supporting the development of sustainable-managed value chains and food production; and leveraging marine resources, incl. sargassum towards a bioeconomy.
- Supporting water governance processes, relevant actors and solutions towards integrated water resources management and ensure equitable access.
- Fostering the development and use of early warning systems and risk assessments and contributing to the adaptation and preparedness of communities.
- Promoting action to change the model of production and consumption to reduce waste and pollution, foster innovation and create green jobs and opportunities.

Specific provisions for each activity will be outlined in the respective RfS. These activities may include elements from the following non-exhaustive list:

- Stakeholder engagement: Continuous engagement and consultation through in-person and online events, working groups, and dialogue platforms.
- Data and Information: Support in conducting field assessments, gap analyses, and policy research and collecting relevant information.

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

- Secondments/Placements: Up to 10 short-term placements in regional partner institutions to strengthen institutional ownership and project continuity.
- Knowledge Management: Coordination with GIZ to ensure aligned messaging, promotion of success stories, and documentation of lessons learned.

2.4 Project and knowledge management requirements

The contractor is responsible for selecting, preparing, training and steering the experts assigned to carry out the advisory services.

The contractor makes the required materials, equipment and consumables available and covers their operating and administrative costs.

The contractor manages costs and expenditures, accounting processes and invoicing in line with GIZ requirements.

Monitoring and reporting requirements

The contractor reports to GIZ regularly in accordance with the version of the General Terms and Conditions of Contract for supplying services and work on behalf of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ AVB) that is applicable to this contract.

The contractor is responsible for providing at an agreed frequency relevant information to GIZ/Euroclima required for monitoring, evaluation and reporting.

In addition, the contractor submits the following reports:

- Inception report (within 3 months of the contract start date).
- Contributions to GIZ's commissioning parties' report (EU twice and BMZ once a year).
- Brief half-yearly reports on the implementation status of the service (5-7 pages).

The general content and format of these reports will be agreed upon during implementation. The reports should provide information about the progress made towards objectives in each of the monitoring areas specified above and be written in English.

Requirements for company-wide learning, knowledge and innovation:

- Contributions to events, such as workshops, webinars, trainings and conferences.

Backstopping requirements:

The contractor ensures appropriate backstopping. In accordance with GIZ's General Terms and Conditions for supplying services and work on behalf of GIZ, these services – as well as the ancillary personnel costs – must be priced into the fee schedules of the staff listed in the tender. The following services form part of the standard backstopping package.

- The contractor's responsibility for its own staff;

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

- Ensuring the flow of information between GIZ and the contractor's field staff;
- Process-oriented technical and conceptual steering of the consulting services;
- Steering adaptations to changing framework conditions;
- Performance monitoring;
- Ensuring the administrative management of the project;
- Ensuring compliance with reporting requirements;
- Technical support by the contractor's staff for its personnel on the ground;
- Making local use of and sharing the lessons learned by the contractor with the GIZ team.

Property rights, communication, and visibility

The consultancy services delivered through this contract contribute to meeting the objectives of Euroclima specifically and GIZ more broadly. To highlight this causal relationship, Euroclima greatly values a common and standardised project identity and branding in all communication with external partners.

With that in mind, and unless explicitly agreed otherwise in writing, all work carried out by the contractor will be delivered based on Euroclima branding and design requirements. Specifically, and among other things, this may entail the following elements:

Euroclima identity

All experts assigned by the contractor shall represent Euroclima externally towards partners and other stakeholders. This includes that experts introduce themselves as representatives of Euroclima in first instance, and in second instance as representatives of the contractor's organisation(s).

Euroclima templates

Generally, all experts assigned by the contractor are expected to develop documents relating to ongoing consultancy tasks based on templates using Euroclima branding. Nonetheless, transparency to the contractor's contribution can be facilitated. The way in which this contribution is made visible will be agreed upon with GIZ/Euroclima and will be aligned with the communication and visibility guidelines established by the EU, which - while allowing recognition of intellectual property - prohibits using other logos in the Programme's communication. The templates for this purpose will be made available timely to the contractor after the contract has been awarded.

European Union communication guidelines and rules

All communication related to the actions of Euroclima is governed by the [European Union's Communication and Visibility Guidelines](#). Any type of external communication activity must

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

comply with the rules and protocols set out therein and must be agreed with the GIZ counterpart.

Communication with partners

Generally, all experts assigned by the contractor are expected to participate in briefing sessions where further guidance will be given on appropriate conduction and communication with partners, considering intercultural and gender-sensitive conduction and language.

2.5 Data protection and information security

The provisions on data protection and information security of the current version of GIZ's General Terms and Conditions of Contract (section 1.10 Data protection) apply.

2.6 Other requirements

- Gender equality and social inclusion: Actions will be gender-responsive if not transformative and properly mainstream gender and social inclusion where possible.
- Environmental protection and climate action: Environmental protection and climate action should remain at the centre of any actions carried out under this contract.
- Conflict and context sensitivity: Communities and countries' norms, traditions and knowledge must be respected and considered at all times.
- Human rights: Actions will take a human rights-based approach to properly promote the fulfilment of rights, leave no one behind and do no harm.
- Security precautions: The contractor has to follow GIZ security recommendations and attend mandatory security briefings.

3. Technical-methodological concept

In this section, the tenderer is required to reflect on the objectives and terms of reference of the tender at hand, describe the partner system and its processes and present the technical-methodological concept for completing the tasks listed in section 2 and achieving the set objectives. In addition, the tenderer must describe the design of the project management process. The tenderer should avoid repeating information from existing documents. The restrictions on the number of pages given in section 6 of these ToR must be followed.

3.1 Interpretation of objectives (section 1.1 of the assessment grid)

The tenderer is required to interpret the objectives for which it is responsible for and provide a critical appraisal of the task (section 1.1.1 of the assessment grid). Simple repetition of the objectives formulated in section 2 of the ToRs is not desired. Rather, the contractor is expected to describe and interpret the changes in the partner system that are to be directly achieved by the object of the tender procedure.

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

The contractor must undertake a critical examination of the ToRs (section 1.1.2 of the assessment grid), by:

- assessing the appropriateness of the personnel concept for implementing the scheduled tasks;
- assessing the results and hypotheses for achieving the objectives and possible risks in implementation;
- assessing the technical concept.

3.2 Processes and actors in the partner system (section 1.2 of the assessment grid)

n/a

3.3 Strategy (section 1.3 of the assessment grid)

The strategy for delivering the services in the tender is the core element of the technical-methodological concept. It is composed of the following elements:

- Procedure for achieving the objectives stated in section 2.2 of these ToRs
- Approaches for leverage effects and measures for scaling-up
- Consideration of environmental and social compatibility requirements
- Ensuring links between work packages where applicable

3.3.1 Strategic approach to achieving the objectives mentioned in the ToRs
(section 1.3.1 of the assessment grid)

The tenderer is required to describe and justify the approach it plans to adopt to achieve the milestones, objectives and results (see section 2) for which it is responsible.

Operational Flexibility and Regional Capillarity

Given the demand-driven nature of this contract, the tenderer must demonstrate the ability to respond rapidly and effectively to assignments in various LAC countries, which will be identified during the implementation phase. The technical leadership of the contract may be based in Europe; however, the successful tenderer is expected to ensure sufficient operational flexibility, local presence, and logistical reach to deliver high-quality services across LAC region within tight timeframes.

Tenderers are therefore requested to present a clear strategy outlining how they will ensure timely mobilization of experts, effective coordination with national stakeholders, and regional capillarity — whether through in-country partners, regional offices, affiliated experts, or rapid deployment mechanisms. This strategy should demonstrate how the tenderer will ensure context-sensitive implementation, maintain close engagement with Euroclima/GIZ and beneficiary institutions, and guarantee continuity and quality of services throughout the contract duration.

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

3.3.2 Building partnerships with the relevant actors

(section 1.3.2 of the assessment grid)

n/a

3.3.3 Approaches for leverage effects and measures for scaling-up

(section 1.3.3 of the assessment grid)

n/a

3.3.4 Consideration of environmental and social compatibility requirements

(section 1.3.4 of the assessment grid)

Gender equality

The tenderer is required to outline in the tender how it can prevent negative impacts on gender equality and social inclusion in its area of responsibility and how it can contribute to improving gender equity through corresponding measures (see also relevant requirements in section 2.5) while taking an intersectional approach.

Environmental protection and climate action (climate change mitigation/adaptation)

The tenderer is required to outline in the tender how it can prevent negative impacts on the environment and the climate in its area of responsibility and, in addition, how it can contribute to improving the environmental and climate situation accordingly implementing measures and promoting co-benefits (see also relevant requirements in section 2.5).

Conflict and context sensitivity

The tenderer is required to outline in the tender how it is planning its activities in the context of conflicts or violence and what specific measures it has adopted for context-sensitive implementation that acknowledges the Programme's interculturality (see also relevant requirements in section 2.5).

Human rights

The tenderer is required to outline in the tender how it can prevent negative impacts on the human rights situation in its area of responsibility and how it can contribute to improving the human rights situation through corresponding measures (see also relevant requirements in section 2.5).

Requirement: 'Gender equality':	2 points out of 10 (maximum)
Requirement: 'Environmental protection and climate action (climate change mitigation/adaptation)':	5 points out of 10 (maximum)
Requirement: 'Conflict and context sensitivity':	2 points out of 10 (maximum)

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

Requirement: 'Human rights':	1 points out of 10 (maximum)
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3.4 Project management

(section 1.4 of the assessment grid)

In this section, the tenderer presents the operational plan for implementing the services in the tender, describes the procedure for coordination with GIZ or the project and the project partners, and explains its monitoring procedure.

Since products of this contract are tentative only and subject to the dynamics in the Euroclima implementation, an order clarification (Request for Service) is defined between GIZ and the contractor, before each of the respective products of work packages are initiated. The tenderer should present and explain their approach and procedure for managing the diverse and at times complex and short-term tasks. In addition, the management approach and the coordination structure within the different experts and pools and their coordination with each other must be considered.

3.4.1 Operational plan

(section 1.4.1 of the assessment grid)

The tenderer is required to draw up and explain an operational plan for implementing the strategy described in Section 3.3, including a plan for the assignment of all the experts included in the tender. The operational plan must include the assignment times (periods and expert days) and assignment locations of the individual experts, the milestones as presented in Section 2 and, in particular, describe all the necessary work stages in detail and in chronological order. The tenderer can define further milestones beyond those prescribed in Section 2 and map them out in the operational plan.

As outlined above, the actual work packages and activities listed in session 2.2 might deviate from the suggestions in this ToR. For reasons of comparability, the applicant is requested to follow this orientation in the proposal.

3.4.2 Coordination with GIZ or the commissioning project

(section 1.4.2 of the assessment grid)

In the tender, the tenderer is required to describe the procedure for coordinating with GIZ and with Euroclima as the commissioning project.

3.4.3 Steering or coordination of measures with the relevant implementing partner

(section 1.4.3 of the assessment grid)

n/a

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

3.4.4 Monitoring

(section 1.4.4 of the assessment grid)

n/a

3.5 Further requirements

(section 1.5 of the assessment grid)

The tenderer is required to describe its backstopping strategy. Especially considering the additional resources of expertise that the tenderer could directly tap into (e.g., further technical staff, supervision/management structures in place for troubleshooting or quality management, internal knowledge systems and extensive external expert networks).

These resources may be further substantiated by providing CVs or organisational charts. The backstopping services listed in section 2.4 of these ToR must be factored into the fees for the staff listed in the tender as ancillary staff costs in accordance with GIZ's General Terms and Conditions.

The tenderer is required to describe its quality assurance strategy and its approach to ensuring adequate quality of services (e.g., quality control and regular training of staff) and explanations and, where possible, evidence of how it will collaborate and integrate national actors (for example national institutions and network partners) in the context of service delivery.

The tenderer is required to outline its diversity and gender equality approach in its HR concept.

Proposed text length within the offer: 1-3 pages of plain text and any possible illustrations, CVs, organisational charts, etc.

Requirement: backstopping strategy: 3 points out 10 (max.)

Requirement: quality assurance strategy: 4 points out 10 (max.)

Requirement: diversity and gender equality: 3 points out 10 (max.)

4. Personnel

The tenderer is required to provide 'experts' for the Key Experts positions referred to and described (scope of tasks and qualifications) in this section based on corresponding CVs. Detailed descriptions of Pools 1 – 5 are nonetheless included for orientation. **The requirements on the format and content of the CVs are described in section 6.**

When selecting personnel, the contractor must ensure that the team is well-balanced with respect to gender and age.

The qualifications mentioned below correspond to the requirements for achieving the highest number of points (10) in the technical assessment. One year of professional experience' is

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy



Transaction number: 7000001450

therefore defined as a cumulative 12 expert months with at least 18 expert days per month, provided no diverging definition is specified for individual qualifications.

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

<i>Staff (assessment grid section)</i>	<i>Number of experts</i>	<i>Role</i>
Key Expert 1: Project Manager (2.1)	1	The Project Manager coordinates the implementation of services and allocation of experts, facilitates sustainable knowledge exchange with GIZ and with relevant stakeholders, and is the main liaison with GIZ and its partners. This expert also coordinates and ensures gender and inclusion mainstreaming measures are implemented within all work packages.
Key Expert 2: Key Expert on Energy Transition (2.2)	1	The expert on energy transition provides expertise on technical questions and supports the project manager in technical planning and management on all topics related to the energy actions within Euroclima, including renewable energy, energy efficiency, energy integration in LAC. A particular focus will be put on green hydrogen.
Key Expert 3: Key Expert on Sustainable Mobility (2.3)	1	The expert on sustainable mobility provides expertise on technical questions and supports the project manager in technical planning and management on all topics related to sustainable mobility.
Key Expert 4: Key Expert on Climate Finance and private investment (2.4)	1	The expert on climate finance and private investment provides expertise on technical questions and supports the project manager in technical planning and management on all topics related to climate finance including green bonds, carbon pricing, investment opportunities related to the GGIA and related topics.
Key Expert 5: Key Expert on Bioeconomy (2.5)	1	The expert on bioeconomy provides expertise on technical questions and supports the project manager in technical planning and management on all topics related to bioeconomy, development of sustainable value chains for non-timber products, innovation and related aspects.
Key Expert 6: Key Expert on Resilience and Adaptation, incl. Nature-based Solutions (2.6)	1	The expert on resilience and adaptation provides expertise on technical questions and supports the project manager in technical planning and management on all topics related to resilience and adaptation, including financing of nature-based solutions.
Expert 7: Pool 1 Energy, sustainable mobility decarbonization and circular economy experts	6-7	This pool comprises experts with experience in the areas of sustainable energy, sustainable mobility, decarbonization in the industry and circular economy to inform any activities carried out in these areas.
Expert 8: Pool 2 Climate finance and carbon market experts	5-6	This pool comprises experts with experience in the areas of private climate finance, carbon pricing and green bonds and other financing instruments to provide technical assistance for any activities carried out in these areas.
Expert 9: Pool 3 Bioeconomy, resilience and adaptation experts	4-5	This pool comprises experts with experience in the areas of bioeconomy, resilience and adaption to inform any activities carried out in these areas.

Soft skills of team members

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

In addition to their specialist qualifications, all team members are also expected to have the following qualifications:

- Teamwork and cooperation skills
- Initiative and proactivity
- Communication skills
- Sociocultural and intercultural skills
- Efficient partner- and client-oriented working methods
- Interdisciplinary thinking

Soft skills are not evaluated.

Key Expert 1: Project Manager (section 2.1 of the assessment grid)

This position is a key expert. A statement of availability for this expert must be attached to the tender as an annex.

The position of Key Expert 1, 'Project Manager', can also be split between two persons. In this case, the evaluation of the tender will be the average for each criterion/qualification of the two individual ratings according to the shares of the split position defined in the offer.

Tasks of key expert 1

- Serve as the main point of contact for GIZ on all contractual, administrative, and strategic planning issues. Lead the negotiation and structuring of RfS, ensuring that activities are demand-driven, fit-for-purpose, and support synergies between the areas.
- Identify human resource needs in line with thematic and geographic demands. Lead the planning and deployment of long-term and short-term experts, ensuring gender-balanced and context-appropriate staffing. Supervise and support regional and international experts and ensure a consistent approach to stakeholder engagement and technical delivery across work packages.
- Ensure the integration of key cross-cutting issues including gender equality and social inclusion into all project activities, outputs, and deliverables.
- Lead the compilation of robust – where possible gender-disaggregated data – according to the existing monitoring systems. Oversee regular and ad-hoc reporting cycles, track progress against indicators, manage adaptive planning processes, and ensure that deliverables meet quality standards, including technical soundness, inclusivity, and regional relevance.
- Oversee financial management, including budget planning, monitoring of expert working days, and ensuring cost-effectiveness across activities. Ensure transparent and compliant use of funds, in consultation with GIZ's commissioning officer.
- Ensure technical and strategic consistency of outputs across work packages, particularly in complex or multi-country assignments. Review and approve reports and knowledge products, ensuring clarity, accuracy, and alignment with Euroclima's overarching transformation goals.
- Coordinate with GIZ and implementing partners to document and disseminate lessons learned, success stories, and best practices from all eight thematic areas. Ensure that

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

knowledge products, case studies, and methodological tools are well-integrated into Euroclima’s regional platforms, exchanges, and networks.

- Guide and supervise engagement strategies with national governments, civil society, academia, private sector actors, and regional institutions. Support the implementation of inclusive participatory processes and political dialogue formats that strengthen regional cooperation and peer learning.

Qualifications of key expert 1

Education/training (section 2.1.1 of the assessment grid):	University degree, (master’s level – 10 points, bachelor’s level – 3 points) in one of the following fields: social sciences, economics, natural sciences, engineering, business administration. Comparable degrees may also be eligible in case they are relevant to the assignment.
Language (section 2.1.2 of the assessment grid):	Knowledge of English C1-level (5 out of a maximum of 10 points) and Spanish C1-level (5 out of a maximum of 10 points) in the Common European Framework of Reference for Languages.
General professional experience (section 2.1.3 of the assessment grid):	10 years in total of professional experience in contract or project management relating to technical international cooperation implementation measures.
Specific professional experience (section 2.1.4 of the assessment grid):	10 years of professional experience in one of the key sectors of Euroclima
Leadership/management experience (section 2.1.5 of the assessment grid):	7 years of management experience in projects, companies or other organisations with disciplinary leadership responsibility for 15 people.
International professional experience outside the country/region of assignment (section 2.1.6 of the assessment grid):	- Not applicable -
Professional experience in the country/ region of assignment (2.1.7 of the assessment grid):	10 years of professional experience in South America, the Caribbean and/or Central America (in accordance with UN DESA Statistics Division).
Experience in the field of development cooperation (section 2.1.8 of the assessment grid):	5 years of experience in development cooperation projects
Other (section 2.1.9 of the assessment grid):	- Not applicable -

Key Expert 2: Key Expert on Energy Transition (section 2.2 of the assessment grid)

This position is a key expert. A statement of availability for this expert must be attached to the tender as an annex.

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

Tasks of key expert 2

- Strengthen participatory governance mechanisms and cross-sectoral, multi-level coordination platforms related to sustainable energy by providing targeted technical advice to public and private stakeholders.
- Provide technical and strategic support for the development and revision of policies, regulations, and implementation plans that align with national climate strategies and promote mitigation and adaptation in the energy sector.
- Design and implement capacity development measures (e.g. trainings, mentoring, technical assistance) to enhance skills in sustainable energy planning and facilitate peer exchanges to disseminate good practices across the LAC region.
- Offer technical expertise for planning, implementation, and upscaling of transformative energy measures, focusing on solutions that cut emissions, build resilience, and promote gender equality and social inclusion.
- Co-develop scalable pilot projects, including support for concept notes and feasibility studies in electric mobility, distributed renewable energy systems, and green hydrogen, ensuring alignment with climate finance investment criteria and inclusive of gender and social considerations.
- Conduct field assessments, gap analyses, and policy research to support evidence-based planning, including data collection and documentation of case studies in sustainable energy.
- Ensure systematic integration of gender and social inclusion, as well as contributions to monitoring, reporting, and knowledge management throughout the implementation of supported activities.
- Contribute to future-focused planning, including promoting the scaling of electric bus systems and expanding distributed renewable energy solutions such as solar microgrids, energy storage, and decentralized energy access models, enabling frameworks for innovation in sustainable, inclusive, and climate-resilient sustainable energy systems.

Qualifications of key expert 2

Education/training (section 2.2.1 of the assessment grid):	University degree, (PhD – 10 points, master’s level – 8 points, bachelor’s level – 3 points) in one of the following fields in Energy, Electrical or Mechanical Engineering, Energy and Climate Policy, Public Policy. Comparable degrees may also be eligible in case they are relevant to the assignment.
Language (section 2.2.2 of the assessment grid):	Knowledge of English C1-level (5 out of a maximum of 10 points) and Spanish C1-level (5 out of a maximum of 10 points) in the Common European Framework of Reference for Languages.
General professional experience (section 2.2.3 of the assessment grid):	10 years of professional experience in renewable energy.

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

Specific professional experience (section 2.2.4 of the assessment grid):	<p>10 years of professional experience in distributed renewable energy systems (3 points).</p> <p>3 years of professional experience in supporting renewable energy policy and regulatory frameworks at national or subnational levels, aligning with climate goals (3 points).</p> <p>5 years of professional experience in renewable energy pilot project design and implementation, incl. concept notes, feasibility studies, and climate finance alignment (2 points).</p> <p>5 years of professional experience in capacity development in renewable energy: designing and delivering trainings, mentoring, and facilitating peer exchanges (2 points).</p>
Leadership/management experience (section 2.2.5 of the assessment grid):	- Not applicable -
International professional experience outside the country/region of assignment (section 2.2.6 of the assessment grid):	- Not applicable -
Professional experience in the country/ region of assignment (2.2.7 of the assessment grid):	7 years of professional experience in South America, the Caribbean and/or Central America (in accordance with UN DESA Statistics Division).
Experience in the field of development cooperation (section 2.2.8 of the assessment grid):	- Not applicable -
Other (section 2.2.9 of the assessment grid):	- Not applicable -

Key Expert 3: Key Expert on Sustainable Mobility (section 2.3 of the assessment grid)

This position is a key expert. A statement of availability for this expert must be attached to the tender as an annex.

Tasks of key expert 3

- Strengthen participatory governance mechanisms and cross-sectoral, multi-level coordination platforms related to sustainable mobility by providing targeted technical advice to public and private stakeholders.

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

- Provide technical and strategic support for the development and revision of policies, regulations, and implementation plans that align with national climate strategies and promote mitigation and adaptation in the mobility sector.
- Design and implement capacity development measures (e.g. trainings, mentoring, technical assistance) to enhance skills in sustainable mobility planning and facilitate peer exchanges to disseminate good practices across the LAC region.
- Offer technical expertise for planning, implementation, and upscaling of transformative mobility measures, focusing on solutions that cut emissions, build resilience, and promote gender equality and social inclusion.
- Co-develop scalable pilot projects, including support for concept notes and feasibility studies in urban mobility such as electric bus fleets, active mobility infrastructure, and integrated multimodal systems ensuring alignment with international climate finance criteria and inclusive of gender and social considerations.
- Conduct field assessments, gap analyses, and policy research to support evidence-based planning, including data collection and documentation of case studies in sustainable mobility.
- Ensure systematic integration of gender and social inclusion, as well as contributions to monitoring, reporting, and knowledge management throughout the implementation of supported activities.
- Contribute to planning, including promoting the scaling of electric bus systems and expanding distributed renewable energy solutions such as solar microgrids, energy storage, and decentralized energy access models.
- Contribute to planning by promoting the scaling of electric bus systems connectivity solutions, and infrastructure, enabling frameworks for innovation in electrified, inclusive, and climate-resilient transport systems.

Qualifications of key expert 3

Education/training (section 2.3.1 of the assessment grid):	University degree, (PhD – 10 points, master’s level – 8 points, bachelor’s level – 3 points) in Transport, Engineering, Urban Planning, Climate Policy or Public Policy. Comparable degrees may also be eligible in case they are relevant to the assignment.
Language (section 2.3.2 of the assessment grid):	Knowledge of English C1-level (5 out of a maximum of 10 points) and Spanish C1-level (5 out of a maximum of 10 points) in the Common European Framework of Reference for Languages.
General professional experience (section 2.3.3 of the assessment grid):	10 years of professional experience in sustainable mobility.
Specific professional experience (section 2.3.4 of the assessment grid):	10 years of professional experience in urban mobility plans, electric mobility and/or active mobility (5 points). 7 years of professional experience in supporting sustainable mobility policy and regulatory frameworks at national, subnational or municipal levels, aligning with climate goals (3 points).

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

	5 years of professional experience in sustainable mobility pilot project design and implementation, incl. concept notes, feasibility studies, and climate finance alignment (1 point). 5 years of professional experience in capacity development for sustainable mobility: designing and delivering trainings, mentoring, and facilitating peer exchanges (1 point).
Leadership/management experience (section 2.3.5 of the assessment grid):	- Not applicable -
International professional experience outside the country/region of assignment (section 2.3.6 of the assessment grid):	7 years of professional experience in <i>three countries outside</i> Europe.
Professional experience in the country/ region of assignment (2.3.7 of the assessment grid):	7 years of professional experience in South America, the Caribbean and/or Central America (in accordance with UN DESA Statistics Division).
Experience in the field of development cooperation (section 2.3.8 of the assessment grid):	- Not applicable -
Other (section 2.3.9 of the assessment grid):	- Not applicable -

Key Expert 4: Key Expert on Climate Finance and private investment (section 2.4 of the assessment grid)

This position is a key expert. A statement of availability for this expert must be attached to the tender as an annex.

Tasks of key expert 4

- Support the development and implementation of national and subnational climate finance strategies, including green budgeting, climate expenditure tracking, and institutional coordination mechanisms, to foster coherent public financial planning for climate action.
- Design and deliver capacity development measures (e.g. trainings, mentoring, technical assistance) for public institutions and private actors to enhance their ability to develop and manage bankable climate and biodiversity projects, including integration of gender and social inclusion criteria.
- Provide expert support for concept development, feasibility assessments, and structuring of climate investment projects, ensuring alignment with the investment criteria of international climate finance institutions (e.g. GCF, GEF, IDB, CAF), and tailored to attract co-financing and de-risking instruments.
- Facilitate the co-development and replication of scalable pilot projects in key sectors, promoting public-private partnerships and innovative financing models.

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

- Contribute to the mobilization of private investment through targeted matchmaking efforts, dialogue with financial institutions, and support to climate finance accelerators and investment platforms that link capital with projects.
- Conduct field-based assessments and policy analyses to inform financial planning, private sector strategies, and evidence-based investment decisions.
- Ensure systematic integration of gender and social inclusion, as well as contributions to monitoring, reporting, and knowledge management throughout the implementation of supported activities.
- Contribute to forward-looking climate finance planning and private sector engagement by identifying and supporting the scaling of transformative, low-carbon, and climate-resilient investment opportunities and promoting enabling environments for investment.
- Support alignment with the Global Gateway strategy and investment agenda, including through the development of bankable project pipelines, blended finance mechanisms, carbon pricing instruments, green bonds, carbon market readiness, and multi-stakeholder investment partnerships.

Qualifications of key expert 4

Education/training (section 2.4.1 of the assessment grid):	University degree, (PhD – 10 points, master’s level – 8 points, bachelor’s level – 3 points) in Economics, Business Administration, International Business, Public Policy, Sustainable Development or Sustainable Management. Comparable degrees may also be eligible in case they are relevant to the assignment.
Language (section 2.4.2 of the assessment grid):	Knowledge of English C1-level (5 out of a maximum of 10 points) and Spanish C1-level (5 out of a maximum of 10 points) in the Common European Framework of Reference for Languages.
General professional experience (section 2.4.3 of the assessment grid):	10 years of professional experience in climate finance including green bonds and/or carbon pricing.
Specific professional experience (section 2.4.4 of the assessment grid):	<p>7 years of professional experience in designing, structuring and implementing climate finance instruments (2 points).</p> <p>5 years of professional experience in supporting the formulation of climate finance strategies, public financial management reforms (2 points).</p> <p>3 years of professional experience in advising on enabling frameworks for private investment, incl. public-private partnerships, readiness assessments, regulatory reforms, and incentive structures (2 points).</p> <p>5 years of professional experience in developing bankable climate proposals, incl. financial modelling, risk analysis and eligibility (2 points).</p> <p>2 years of professional experience in capacity development and technical assistance on climate finance and investment preparation: designing and delivering trainings, mentoring, and/or facilitating peer exchanges (1 point).</p>

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

	2 years of professional experience in emerging carbon pricing instruments and their integration into climate finance frameworks (1 point).
Leadership/management experience (section 2.4.5 of the assessment grid):	- Not applicable -
International professional experience outside the country/region of assignment (section 2.4.6 of the assessment grid):	7 years of professional experience in <i>three countries outside</i> Europe.
Professional experience in the country/ region of assignment (2.4.7 of the assessment grid):	7 years of professional experience in South America, the Caribbean and/or Central America (in accordance with UN DESA Statistics Division).
Experience in the field of development cooperation (section 2.4.8 of the assessment grid):	- Not applicable -
Other (section 2.4.9 of the assessment grid):	- Not applicable -

Key Expert 5: Key Expert on Bioeconomy (section 2.5 of the assessment grid)

This position is a key expert. A statement of availability for this expert must be attached to the tender as an annex.

Tasks of key expert 5

- Provide technical and strategic support for the development and revision of policies, regulatory frameworks, and implementation plans that foster bioeconomy models aligned with national climate and development strategies.
- Design and implement capacity development measures (e.g. training, mentoring, technical assistance) to enhance knowledge on bioeconomy, facilitating peer exchanges across LAC and promoting community-led innovation.
- Offer technical expertise for planning, implementation, and upscaling of transformative measures, including agroecological practices and non-timber forest-based value chains—building on Indigenous knowledge and practices.
- Co-develop scalable and replicable pilot projects in areas such as regenerative agriculture, agroforestry, forest-based bioeconomy, and organic value chains, providing support for project planning, feasibility studies, and alignment with climate finance eligibility criteria
- Ensure mainstreaming of gender equality, Indigenous inclusion, and social equity in the design and delivery of activities, as well as contributions to monitoring, reporting, and regional knowledge management.
- Support alignment with the Global Gateway strategy and investment agenda related to bioeconomy.

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

Qualifications of key expert 5

Education/training (section 2.5.1 of the assessment grid):	University degree, (PhD – 10 points, master’s level – 8 points, bachelor’s level – 3 points) in Biology, Ecology, Environmental Science / Management, Agroforestry, Food Systems, Rural Development, Natural Resources Management, Environmental Policy. Comparable degrees may also be eligible in case they are relevant to the assignment.
Language (section 2.5.2 of the assessment grid):	Knowledge of English C1-level (5 out of a maximum of 10 points) and Spanish C1-level (5 out of a maximum of 10 points) in the Common European Framework of Reference for Languages.
General professional experience (section 2.5.3 of the assessment grid):	10 years of professional experience, bioeconomy, sustainable agricultural value chains, environmental economy
Specific professional experience (section 2.5.4 of the assessment grid):	10 years of professional experience in designing and implementing policies programmes on climate-smart agriculture, agroecology, regenerative farming, agroforestry, or other related solutions (5 points) 7 years of professional experience in designing financing solutions for bioeconomy models (4 points). 5 years of professional experience in designing and implementing capacity development initiatives for local producers, cooperatives, Indigenous organizations, and public institutions on sustainable production (1 point).
Leadership/management experience (section 2.5.5 of the assessment grid):	- Not applicable -
International professional experience outside the country/region of assignment (section 2.5.6 of the assessment grid):	7 years of professional experience in <i>three countries outside</i> Europe.
Professional experience in the country/ region of assignment (2.5.7 of the assessment grid):	7 years of professional experience in South America, the Caribbean and/or Central America (in accordance with UN DESA Statistics Division).
Experience in the field of development cooperation (section 2.5.8 of the assessment grid):	- Not applicable -
Other (section 2.5.9 of the assessment grid):	- Not applicable -

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

Key Expert 6: Key Expert on Resilience and Adaptation, incl. Nature-based Solutions
(section 2.6 of the assessment grid)

This position is a key expert. A statement of availability for this expert must be attached to the tender as an annex.

Tasks of key expert 6

- Provide strategic and technical support in the design, revision, and implementation of national and subnational adaptation strategies ensuring alignment with national climate goals.
- Promote the integration of Nature-based Solutions (NbS) into public planning and budgeting, including for urban and rural resilience, ecosystem restoration, watershed management, and disaster risk reduction.
- Support the mainstreaming of climate risk, ecosystem services valuation, and co-benefits into climate adaptation and resilience projects and policies.
- Design and deliver capacity development measures (e.g., training, technical assistance, and peer learning exchanges) on ecosystem-based adaptation, water governance, integrated risk management, and resilient infrastructure planning.
- Co-develop scalable and replicable pilot projects in ecosystem-based adaptation, climate-resilient agriculture, providing technical input on project structuring, feasibility studies, and climate risk assessments.
- Support access to and mobilization of climate and natural capital finance, including natural capital accounting, NbS investment plans, and identification of de-risking instruments and blended finance mechanisms tailored to adaptation interventions.
- Ensure mainstreaming of gender equality, Indigenous inclusion, and social equity in the design and delivery of activities, as well as contributions to monitoring, reporting, and regional knowledge management.
- Engage with Indigenous Peoples and local communities (IPLCs) to promote and incorporate traditional knowledge systems in adaptation and resilience governance.
- Contribute to future-oriented planning processes, including promoting the resilience of water infrastructure, early warning systems, climate-smart watershed governance, and integration of climate risk in land-use and investment planning.

Qualifications of key expert 6

Education/training (section 2.6.1 of the assessment grid):	University degree, (PhD – 10 points, master’s level – 8 points, bachelor’s level – 3 points) in Disaster Risk Management, Biology, Ecology, Earth Sciences, Resource Management, Environmental Engineering, Integrated Water Management, Climate Change or Geography. Comparable degrees may also be eligible in case they are relevant to the assignment.
Language (section 2.6.2 of the assessment grid):	Knowledge of English C1-level (5 out of a maximum of 10 points) and Spanish C1-level (5 out of a maximum of 10 points) in the Common European Framework of Reference for Languages.
General professional experience (section 2.6.3 of the assessment grid):	10 years of professional experience in climate change adaptation and resilience.

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

Specific professional experience (section 2.6.4 of the assessment grid):	10 years of professional experience in designing, implementing, or advising on climate change adaptation strategies or disaster risk reduction (DRR) plans, integrating nature-based solutions (NbS) and/or ecosystem-based adaptation approaches or green infrastructure solutions (5 points). 5 years of professional experience in adaptation finance (4 points). 5 years of professional experience in designing and delivering capacity development measures, technical assistance, or peer learning on adaptation and resilience-building (1 point).
Leadership/management experience (section 2.6.5 of the assessment grid):	- Not applicable -
International professional experience outside the country/region of assignment (section 2.6.6 of the assessment grid):	7 years of professional experience in <i>three countries outside</i> Europe.
Professional experience in the country/ region of assignment (2.6.7 of the assessment grid):	7 years of professional experience in South America, the Caribbean and/or Central America (in accordance with UN DESA Statistics Division).
Experience in the field of development cooperation (section 2.6.8 of the assessment grid):	- Not applicable -
Other (section 2.6.9 of the assessment grid):	- Not applicable -

Expert 7: Pool 1 ‘Energy, decarbonization and circular economy experts pool’ with 6 - 7 experts

The experts in this pool are not part of the technical assessment, so no CVs need to be submitted with the tender. The qualifications specified for the pool are therefore minimum requirements, the fulfilment of which must be confirmed by GIZ before the experts are assigned.

The actual number of experts assigned from the pool may differ from the number of experts required in section 4 of the Terms of Reference. For experts not named in the tender, GIZ must confirm before the assignment that their qualifications are equivalent to those of the short-term experts proposed in the tender.

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

Tasks of the expert 7 (pool 1)

- Strengthen participatory governance mechanisms and multi-stakeholder, multi-level coordination platforms by providing technical advice and capacity support to public and private stakeholders in the energy, mobility and circular economy sectors.
- Support the development and revision of policies, regulations, strategies, and implementation plans that promote low-emission, circular, climate-resilient energy and mobility systems aligned with national climate commitments, integrating gender and social inclusion.
- Design and implement capacity development measures, including training programs, technical assistance, and peer exchanges to build institutional capacities in sustainable energy, sustainable mobility, circular economy and industrial decarbonization.
- Provide technical expertise for the planning, implementation, and scaling of transformative, inclusive, and climate-resilient projects in areas such as circular economy, green hydrogen, distributed renewable energy, energy efficiency and sustainable urban mobility.
- Co-develop and support scalable pilot projects, including drafting of concept notes, feasibility studies, and alignment with international climate finance investment criteria (e.g., GCF, GEF, IDB, EIB), including co-benefits for resilience, gender, and social inclusion.
- Conduct field assessments, gap analyses, and policy research to inform evidence-based decision-making and document regional case studies for replication and learning in sustainable energy, sustainable mobility, circular economy and industrial decarbonization.
- Support knowledge management, reporting, and regional learning, contributing to the dissemination of best practices and lessons learned across the LAC region

Qualifications of the expert 7 (Pool 1)

Education/training:	University degree, i.e. bachelor and master’s in Energy, Electrical Engineering, Energy and Climate Policy, Circular Economy, Transportation Engineering, Urban Planning or Public Policy. Comparable degrees may also be eligible in case they are relevant to the assignment.
Language:	<p>Knowledge of English C1-level (5 out of a maximum of 10 points) and Spanish C1-level (5 out of a maximum of 10 points) in the Common European Framework of Reference for Languages.</p> <p>1 expert per area (energy, mobility, circular economy and industrial decarbonization) with knowledge of Portuguese C1-level (5 out of a maximum of 10 points) in the Common European Framework of Reference for Languages.</p>

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

General professional experience:	7 years of professional experience in sustainable energy, sustainable mobility, decarbonization and/or sustainable urban mobility.
Specific professional experience:	7 years of professional experience in <ul style="list-style-type: none"> • Electric mobility, renewable energy systems, green hydrogen, energy efficiency. • Supporting policy and regulatory frameworks for sustainable infrastructure, aligned with NDCs or national climate strategies. • Designing and implementing climate-related pilot projects (concept notes, feasibility studies, investment planning, climate finance readiness). • Developing and facilitating capacity development activities (e.g., technical assistance, trainings, mentoring, peer exchanges). • Urban mobility plans, electric mobility and/or active mobility • Supporting sustainable mobility policy and regulatory frameworks at national, subnational or municipal levels, aligning with climate goals • Sustainable mobility pilot project design and implementation, incl. concept notes, feasibility studies, and climate finance alignment • Capacity development for sustainable mobility: designing and delivering trainings, mentoring, and facilitating peer exchanges
Leadership/management experience:	- Not applicable -
International professional experience outside the country/region of assignment:	5 years of professional experience in <i>three countries outside</i> Europe.
Professional experience in the country/ region of assignment:	5 years of professional experience in South America, the Caribbean and/or Central America (in accordance with UN DESA Statistics Division).
Experience in the field of development cooperation:	- Not applicable -
Other:	- Not applicable -

Expert 8: Pool 2 ‘Climate Finance and carbon market experts pool’ with 5 - 6 experts

The experts in this pool are not part of the technical assessment, so no CVs need to be submitted with the tender. The qualifications specified for the pool are therefore minimum requirements, the fulfilment of which must be confirmed by GIZ before the experts are assigned.

The actual number of experts assigned from the pool may differ from the number of experts required in section 4 of the Terms of Reference. For experts not named in the tender, GIZ must

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

confirm before the assignment that their qualifications are equivalent to those of the short-term experts proposed in the tender.

Tasks of the expert 8 (pool 2)

- Support the development and implementation of national and subnational climate finance strategies and institutional coordination mechanisms, to foster coherent public financial planning for climate action.
- Design and deliver capacity development measures (e.g. trainings, mentoring, technical assistance) for public institutions and private actors to enhance their ability to develop and manage bankable climate and biodiversity projects, including integration of gender and social inclusion criteria.
- Provide expert support for concept development, feasibility assessments, and structuring of climate investment projects, ensuring alignment with the investment criteria of international climate finance institutions (e.g. GCF, GEF, IDB, CAF), and tailored to attract co-financing and de-risking instruments.
- Facilitate the co-development and replication of scalable pilot projects in key sectors, promoting public-private partnerships and innovative financing models.
- Contribute to the mobilization of private investment through targeted matchmaking efforts, dialogue with financial institutions, and support to climate finance accelerators and investment platforms that link capital with projects.
- Conduct field-based assessments and policy analyses to inform financial planning, private sector strategies, and evidence-based investment decisions.
- Contribute to forward-looking climate finance planning and private sector engagement by identifying and supporting the scaling of transformative, low-carbon, and climate-resilient investment opportunities and promoting enabling environments for investment.
- Support alignment with the Global Gateway strategy and investment agenda, including through the development of bankable project pipelines, blended finance mechanisms, carbon pricing instruments, green bonds, emission trading systems and other approaches to carbon markets, and multi-stakeholder investment partnerships.

Qualifications of the expert 8 (pool 2)

Education/training	University degree, i.e. bachelor and master's in economics, Business Administration, International Business, Public Policy, Sustainable Development, Sustainable Management or related fields.
Language	<p>Knowledge of English C1-level (5 out of a maximum of 10 points) and Spanish C1-level (5 out of a maximum of 10 points) in the Common European Framework of Reference for Languages.</p> <p>1 expert per area (climate finance and carbon markets) with knowledge of Portuguese C1-level (5 out of a maximum of 10 points) in the Common European Framework of Reference for Languages.</p>
General professional experience	7 years of professional experience in climate finance and private investment.
Specific professional experience	7 years of professional experience in

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

	<ul style="list-style-type: none"> • Designing, structuring and implementing climate finance instruments and international climate finance institutions. • Developing bankable climate proposals, incl. financial modelling, risk analysis and eligibility. • Supporting in the formulation of climate finance strategies, public financial management reforms, and private sector engagement for climate investment. • Advising on enabling frameworks for private investment, incl. public-private partnerships, readiness assessments, regulatory reforms, and incentive structures. • Capacity building and technical assistance on climate finance and investment preparation. • Emerging carbon pricing instruments and their integration into climate finance and other frameworks.
Leadership/management experience	- Not applicable -
International professional experience outside the country/region of assignment	5 years of professional experience in <i>three countries outside Europe</i> .
Professional experience in the country/ region of assignment	5 years of professional experience in South America, the Caribbean and/or Central America (in accordance with UN DESA Statistics Division).
Experience in the field of development cooperation	- Not applicable -
Other	- Not applicable -

Expert 9: Pool 3 ‘Bioeconomy, resilience and adaptation experts pool’ with 4 - 5 experts

The experts in this pool are not part of the technical assessment, so no CVs need to be submitted with the tender. The qualifications specified for the pool are therefore minimum requirements, the fulfilment of which must be confirmed by GIZ before the experts are assigned.

The actual number of experts assigned from the pool may differ from the number of experts required in section 4 of the Terms of Reference. For experts not named in the tender, GIZ must confirm before the assignment that their qualifications are equivalent to those of the short-term experts proposed in the tender.

Tasks of the expert 9 (pool 3)

- Provide technical and strategic support for the development and revision of policies, regulatory frameworks, and implementation plans that foster bioeconomy, sustainable land management, resilient food systems, nature-based solutions aligned with national climate and development strategies.
- Design and implement capacity development measures (e.g. training, mentoring, technical assistance) to enhance knowledge on bioeconomy, climate-resilient

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

agriculture, NbS, facilitating peer exchanges across LAC and promoting community-led innovation.

- Offer technical expertise for planning, implementation, and upscaling of transformative measures, including agroecological practices, sustainable livestock systems, restoration of degraded lands, and non-timber forest-based value chains—building on Indigenous knowledge and practices where needed.
- Co-develop scalable and replicable pilot projects in areas such as regenerative agriculture, agroforestry, forest-based bioeconomy, and organic value chains, providing support for project planning, feasibility studies, and alignment with climate finance eligibility criteria.
- Conduct field assessments, baseline studies, and policy research to identify financing opportunities in agri-food and bioeconomy systems, including data collection and case study documentation.
- Support future-focused planning processes, including financing instruments for sustainable value chains, circular use of biomass and waste, and agroecological transitions that strengthen climate resilience and rural livelihoods.

Qualifications of the expert 9 (pool 3)

Education/training	University degree, i.e. bachelor and master’s in biology, Ecology, Environmental Science / Management, Agroforestry, Food Systems, Rural Development, Circular Economy, Natural Resources Management or Environmental Policy. Comparable degrees may also be eligible in case they are relevant to the assignment.
Language	Knowledge of English C1-level (5 out of a maximum of 10 points) and Spanish C1-level (5 out of a maximum of 10 points) in the Common European Framework of Reference for Languages. Min. 1 expert per area (bioeconomy, adaptation and resilience) with knowledge of Portuguese C1-level (5 out of a maximum of 10 points) in the Common European Framework of Reference for Languages.
General professional experience	7 years of professional experience in bioeconomy, resilience, adaptation and/or resilient food production.
Specific professional experience	7 years of professional experience in <ul style="list-style-type: none"> • Designing and implementing policies programmes on climate-smart agriculture, agroecology, bioeconomy, agroforestry, or other solutions. • Working with Indigenous Peoples and local communities to integrate Indigenous knowledge and traditional practices into sustainable land use and bioeconomy models. • Developing or supporting value chains in bio-based or circular economy sectors. • Designing and implementing capacity development initiatives for local producers, cooperatives, Indigenous organizations, and public institutions on sustainable production.

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

	<ul style="list-style-type: none"> • Developing pilot or demonstration projects, including preparing concept notes, feasibility studies, and aligning with donor/investor requirements. • Adaptation frameworks, rural development strategies, and national/sub-national policies in LAC in the agri-food sector. • Conducting field assessments or research, including data collection, baseline analysis, and case study development. • designing, implementing, or advising on climate change adaptation strategies or disaster risk reduction (DRR) plans, integrating nature-based solutions (NbS) and/or ecosystem-based adaptation approaches or green infrastructure solutions
Leadership/management experience	- Not applicable -
International professional experience outside the country/region of assignment	5 years of professional experience in <i>three countries outside</i> Europe.
Professional experience in the country/ region of assignment	5 years of professional experience in South America, the Caribbean and/or Central America (in accordance with UN DESA Statistics Division).
Experience in the field of development cooperation	- Not applicable -
Other	- Not applicable -

UN DESA regions are defined as East Africa, Central Africa, North Africa, Southern Africa, West Africa, South America, the Caribbean, Central America, North America, Central Asia, East Asia, South Asia, Southeast Asia, West Asia/Middle East, Eastern Europe, Northern Europe, Southern Europe, Western Europe, Australia, Melanesia, Micronesia and Polynesia. Tenderers should refer to [UN DESA definitions](#).

The tenderer must assign all the proposed key experts to the required qualifications and clearly present them in a separate table preceding the CVs. The summary presentation must mention only qualifications that are indicated in the CVs. Professional experience must be evidenced by meaningful references in the CVs. It is advisable to make explicit reference to each example of professional experience.

5. Costing requirements

5.1 Assignment of experts

In your tender, please do not deviate from the specification of quantities required in these ToRs (the number of experts and expert days, the budget specified in the price schedule). This is part of the competitive tender and is used to ensure that the tenders can be compared objectively. Please note only services that were commissioned by GIZ and rendered by the

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

contractor will be remunerated. It may not be necessary to make use of the total number of proposed expert days.

The number of expert days corresponds to full working days.

Expert	Expert days in the country of residence / remote	Availability of expert in the country of assignment* in expert days	Expert days in total	Consecutive stay > 3 months (see General Terms and Conditions, section 3.3.2)
Key Expert 1: Project Manager	180	20	200	no
Key Expert 2: Key expert on Energy Transition	90	10	100	no
Key Expert 3: Key expert on Sustainable Mobility	70	5	75	no
Key Expert 4: Key Expert on climate finance and private investment	115	10	125	no
Key Expert 5: Key expert on Bioeconomy	75	5	80	no
Key Expert 6: Key expert on resilience and adaptation, incl. NbS	45	5	50	no
Expert 7: Pool 1 Energy, Sustainable Mobility, Decarbonization and Circular economy experts	55	65	120	no
Expert 8: Pool 2 Climate Finance and Carbon Market experts	55	65	120	no
Expert 9: Pool 3 Bioeconomy, resilience and adaptation experts	20	40	60	no

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

5.2 National administrative staff

– Not applicable –

5.3 Travel expenses

5.3.1 Travel – sustainability considerations

GIZ would like to reduce greenhouse gas emissions (CO₂ emissions) caused by travel. When preparing your tender, please incorporate options for reducing emissions, for example by selecting the lowest-emission booking class (economy) or using means of transport, airlines and flight routes that are more CO₂-efficient. For short distances, travel by train (second class) or e-mobility are the preferred options.

CO₂ emissions caused by air travel should be offset if they cannot be avoided. GIZ specifies a budget for this which enables carbon offsets to 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](#) has published a [list of standards](#) (available only in German).

5.3.2 Travel expense requirements

Travel expense budget: EUR 120.000

Budget for CO₂ offsets for flights: EUR 12.000 An unalterable budget for CO₂ offsets for settlement against evidence is specified.

As the number and duration of the business trips is not yet clear, the above-mentioned unalterable travel expense budget for all trips abroad for all experts is specified in the price schedule. The budget contains the following travel expenses:

- Per-diem allowances and accommodation allowances
- Flights and other local transport costs

The costs are reimbursed as a lump sum (per-diem allowances 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 the reimbursement of travel expenses (see <https://www.bundesfinanzministerium.de>), or on presentation of evidence (airfares and other main transport costs).

Notes on the settlement of accommodation allowances in Germany:

- Accommodation allowances up to EUR 80.00 will be reimbursed **on a lump-sum basis**.
- Accommodation allowances between EUR 80.00 and EUR 130.00 will be reimbursed **in the amount evidenced**.

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

- Overnight accommodation allowances that unavoidably exceed EUR 130.00 can be settled only in exceptional cases (e.g. trade fairs) **in the amount evidenced** and subject to a EUR 250.00 limit. A written individual justification must be provided.

All travel activities must be agreed in advance with the project manager. Travel expenses must be kept as low as possible.

Please note: These travel expense items do not cover costs related to the contract in the country of assignment (see section 3.3.2 of the General Terms and Conditions). Please cost these items if applicable in the price schedule under '2.2 Costs related to the contract in the country of assignment'.

5.4 Materials and equipment

– Not applicable –

5.5 Operating costs in the country of assignment

– Not applicable –

5.6 Workshops, education and training

Workshop budget: EUR 140.000

The fixed, unalterable budget above is earmarked for workshops and entered in the price schedule. The budget includes the following costs relating to the planning and running of workshops:

- Room hire
- Technical systems
- Moderation services
- Translation/interpreting services
- Catering
- Workshop materials
- Travel expenses for partner experts (subsistence, accommodation, travel costs)
- Other costs

The budget does not include the fees and travel expenses for the contractor's experts incurred in connection with the planning and running of the workshops. These are covered by the corresponding number of expert days and travel expenses (see sections 5.1 and 5.3 above).

5.7 Local contributions

– Not applicable –

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

5.8 Other costs

– *Not applicable* –

5.9 Flexible remuneration item

Budget for flexible remuneration: EUR 120.000

The fixed, unalterable budget above is earmarked in the price schedule for flexible remuneration. Flexible remuneration is intended to facilitate the flexible management of the contract by the commission manager at GIZ. The contractor can make use of the funds in accordance with section 3.3.5.7 of the General Terms and Conditions.

6. Requirements on the format of the tender

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

The technical-methodological concept of the tender (section 3 of the ToRs) must not exceed 30 pages (not including the cover page, list of abbreviations, table of contents, brief introduction and CV for the backstopper). Additional annexes not requested will not be assessed.

If needed, submit references as external content (links) and identify the external content with its date of creation. This date must not be outside the tendering deadline.

The CVs of the staff proposed in accordance with section of the ToRs must be in the EU format (see *Annex*) and not more than four pages in length. The CVs can also be submitted in Spanish.

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

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

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy

Transaction number: 7000001450

- International professional experience/professional experience in the country of assignment: clear information on the reference projects or fixed positions in the company/organisation in which the requirements specified in section 4 were fulfilled (for example, actual duration of assignment on the ground in full-time expert days, weeks or months) (if relevant)

To facilitate the assessment, the tenderer is expected to number the references sequentially and provide only references that are clearly related to the object of this tender.

7. Options or follow-on contract

7.1 Option to expand the service content/extend the contract term pursuant to section 132 (2) no. 1 German Act against Restraints of Competition (GWB)

GIZ can exercise the following option if it wishes to expand the tendered services. This is described in detail below.

Nature and scope:

While retaining the overall character of the contract, there is a possibility of GIZ continuing to obtain the services specified in section 2 of these Terms of Reference and/or of expanding the contract to include further services of the same kind. The overall contract term must not exceed three times the original contract term, and the overall contract value must not exceed twice the original contract value.

Precondition:

GIZ's commissioning party extends and/or provides additional funding for the current project or commissions a follow-on project and/or an agreement is concluded to provide cofinancing for the measure.

7.2 Follow-on contract pursuant to Section 14 (4) no. 9 German Ordinance on the Award of Public Contracts (VgV)

Pursuant to Section 14 (4) no. 9 VgV, GIZ reserves the right to award a follow-on contract to the contractor in order to procure similar services.

Scope of possible services:

The term of the follow-on contract must not exceed twice that of the original contract, and the value of the follow-on contract must not exceed twice that of the original contract.

Condition: The above option is subject to GIZ receiving a commission from the commissioning party or the conclusion of an agreement for cofinancing of the measure. Any follow-on contract must be awarded within three years of the award date of the original contract.

Subject of the tender procedure: Consulting services for multi-sectoral technical assistance for a green and just transition in Latin America and the Caribbean in line with the EU Global Gateway Strategy



Transaction number: 7000001450

8. Additional Documents

- Countries covered by Euroclima
- Request for Service template
- EU format CV template

Countries covered by Euroclima

Argentina

Bahamas

Barbados

Belize

Bolivia

Brazil

Chile

Colombia

Costa Rica

Cuba

Dominica

Dominican Republic

Ecuador

El Salvador

Grenada

Guatemala

Guyana

Haiti

Honduras

Jamaica

Mexico

Nicaragua

Panama

Paraguay

Peru

Saint Kitts and Nevis

Saint Lucia

Saint Vincent and the Grenadines

Suriname

Trinidad and Tobago

Uruguay

Venezuela

Request for Service (RfS) for the Appointment of Short-Term Experts template

Euroclima

GIZ Contract XXXX
Reference

PN: **22.2188.5-001.06**

Assignment N°: XXXX

Revision **[brief note on what changed since the last version]**

Title		
Work Package		
Expected days and location	Total number of days: Up to [Nr] (including x buffer days) Assignment location: [Country]	
Period of assignment	From [DD/MM/YY] to [DD/MM/YY]	
Expert pool	XXX Consortium	
Project managers	Advisory Service:	[Name and Email]
	Consultant:	[Name and Email]

Split of expert days

Expert category	Expert Name	Task				Project Management	Buffer days	Sum of Expert Days
		1	2	3	4			
Key Expert(s)	[NAME]							
Expert(s) Pool	[NAME]							
Estimated Travel Budget (EUR)								

	Approved by:
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	Date: [DD/MM/YY]
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Project description, outputs, and tasks			
Background Information	<i>Describe in one short paragraph why the support is needed.</i>		
Expected Results	<i>To be filled by Euroclima.</i>		
Deadlines and products			
<i>(Fill the tables for deliverables and workshops)</i>	No.	Documentation Deliverables	Due date
	D1	•	
	D2	•	
	D3	•	
	D4	•	
Frequency of meetings			
<i>(Define frequency of meetings)</i>	No.	Workshop Delivered	Due date
	W1		
	W2		
	W3		
	No.	Meetings	Participants
	M1	•	
	M2		
	M3		
	M4		

	<p>Gender and social inclusion: Gender and inclusion should be considered as a cross-cutting topic in every stage of an activity. This includes, but is not limited to gender mainstreaming, aiming for transformative actions, gender sensitive language, etc. It is crucial to ensure diverse representation among activity participants and experts, speakers, moderators, and other groups, as well as to create a welcoming environment for everyone that enables their participation.</p> <p>Templates and quality assurance: All deliverables should be prepared using Euroclima templates unless otherwise agreed in writing (per e-mail). In order to ensure a high level of quality, please always follow the instructions in the Quality Assurance Guide.</p>
<p>Main tasks</p> <p><i>(Briefly describe in one short paragraph the task/activity. Each bullet point must correspond with the expected deliverable above.)</i></p>	<p>The Key Expert(s) shall perform the following tasks:</p> <ol style="list-style-type: none"> 1. ... <ol style="list-style-type: none"> 1.1. ... 1.2. ... 1.3. ... 2. ... <ol style="list-style-type: none"> 2.1. ... 2.2. ... 2.3. ... 3. ... <ol style="list-style-type: none"> 3.1. ... 3.2. ... 3.3. ...
<p>Reporting language</p>	<p>Working languages:</p> <p>Participation in meetings requires proficiency in the local language.</p> <p>All deliverables must be provided in XXX.</p> <p>Any deviations from this requirement must receive written approval from Euroclima via email.</p>

CV Template for European Commission / EuropeAid funded projects

The CV template is on pages 2 and 3 of this file. Please read these instructions carefully before completing the following pages. By completing your CV appropriately, you will highly increase your chances in tender procedures. Please follow the instructions below for better results:

- It is recommended that you save the CV in the most common DOC format (NOT in DOCX or PDF) to ensure greater compatibility with the computers of the final recipients of your CV.
- No header or footer should be inserted on the file, and paper size should be maintained in A4
- Do not change any formatting, like font type or size, and do not add any pictures or logos to the CV.
- Use **bold** format to highlight sections of the CV that you consider important for the specific assignment that you are applying for.
- If you do not have any information to include in a section, just leave it blank but maintain the title for the section. Do not delete sections.
- **Section 9. Other skills:** Only secondary skills like computer software, internet tools usage, etc. Do not include skills related to your main profession in this section.
- **Section 10. Present position:** Describe only the Position title, company name, and location. The detailed description of your work for this position should be included in section 14.
- **Section 11. Years within the firm:** If you are an independent consultant, include the number of years as independent
- **Section 12. Key qualifications:** please list all your key qualifications and skills describing each one as briefly as possible. If you are applying for a specific request, please indicate and give more emphasis to the topics and qualifications requested on the specific profile as described in the Terms of References of the project.
Please do not confuse the key qualifications section with the professional experience: key qualifications are a presentation of your capacities and knowledge, on the other hand specific work experience should be included in the Section 14 Professional experience. Here are some examples of how to describe your key qualifications:
 - *"More than xx consecutive years of proven working in the field of "*
 - *"In depth knowledge and understanding of ..."*
 - *"Proven experience in programme design (PCM, SWAP, Log frame analysis)."*
- **Section 13. Specific experience in the region:** List only country names and the months and years of your work in the country, the details of each work performed should be reported in the next section "14 Professional experience".
- **Section 14. Professional experience record:** this section you should include all your specific work experience, in permanent positions and projects in which you worked as independent consultant. For each position included in the last 3 years, you should also provide a contact name and tel/email.
- Please delete these notes after completing your CV
- At the end the CV should not have more than 3 pages

CURRICULUM VITAE

Proposed role in the project:

Family name:

First names:

Date of birth:

Nationality:

Civil status:

Education:

Institution (Date from - Date to)	Degree(s) or Diploma(s) obtained:

Language skills: Indicate competence on a scale of 1 to 5 (1 - excellent; 5 - basic)

Language	Reading	Speaking	Writing

Membership of professional bodies:

Other skills: (e.g. Computer literacy, etc.)

Present position:

Years within the firm:

Key qualifications: (Relevant to the project)

Specific experience in the region:

Country	Date from - Date to

Professional experience

Date from - Date to	Location	Company& reference person ¹ (name & contact details)	Position	Description

Other relevant information (e.g., Publications)

¹ The Contracting Authority reserves the right to contact the reference persons. If you cannot provide a reference, please provide a justification.