

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

CONFIDENTIAL

Consultancy service to develop and operationalise GEA's institutional and operational framework	Project number/ cost centre: G-012468-001 Tender number 10052534
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0. List of abbreviations

AG	Commissioning party
AN	Contractor
AVB	General Terms and Conditions of Contract for supplying services and work
FK	Expert
FKT	Expert days
KPIs	Key Performance Indicators
KZFK	Short-term expert
GEA	German Energy Academy in Jordan
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
SOP(s)	Standard Operating Procedures
ToRs	Terms of Reference

1. Context

The German Energy Academy (GEA) in Jordan is a flagship initiative that aims to build a skilled, inclusive workforce to support Jordan's transition to renewable energy and energy efficiency. The project responds to the growing demand for qualified professionals capable of designing, installing, operating, and maintaining clean energy technologies, in line with Jordan's target of increasing the share of renewable energy to 50% by 2030.

Implemented from October 2024 to September 2027, the project seeks to establish GEA as an independent, financially sustainable, and regionally recognized training institution. The academy delivers practical, internationally accredited training programmes in renewable energy and energy efficiency, with a particular focus on emerging areas such as solar technologies, smart grids, green hydrogen, and the electrification of transport and industry. Training programmes are developed in close collaboration with the private sector to ensure alignment with labour market needs and include internships, soft skills development, and both in-person and digital learning modalities. The project adopts an inclusive approach, promoting access for women, refugees, and underserved groups.

The project is commissioned by The Federal Ministry for the Environment, Climate Action, Nature Conservation and Nuclear Safety (BMUKN) under the International Climate Initiative (IKI) and implemented by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH. The Political Partner is the Ministry of Energy and Mineral Resources (MEMR) in Jordan. Key partners include Al Hussein Technical University (HTU), the German Jordanian University (GJU), the Amman Chamber of Industry (ACI), the German Solar Association (BSW), and Ideas into Energy (IIE).

GIZ supports the institutionalisation of GEA by developing and building its legal and governance structures. This assignment aims at conducting a comprehensive review of the existing Business Plan. Through this review and consultations with GEA's relevant stakeholders, this assignment shall provide concrete recommendations and propose any necessary adjustments to ensure that the Business Plan provides a sound and practical basis for GEA's institutionalisation and operations.

Based on the outcomes of this review, this assignment will support the next phase of GEA's institutionalisation by translating the Business Plan into the structures, systems, policies, procedures, and tools required for its establishment and day-to-day operations. The assignment will cover GEA's governance structure including the composition, roles and responsibilities of the Board, decision-making and reporting arrangements, and the relationship between the Board and GEA management. The assignment will also cover organisational structure, roles and responsibilities, standard operating procedures, institutional policies, performance management, internal controls, and the tools and templates required to manage its operations. All frameworks and tools developed under the assignment should be practical, appropriate to GEA's size and stage of development, and aligned with the reviewed Business Plan.

To support this process, GIZ seeks to engage a qualified consultancy firm to develop the institutional and operational framework for GEA. The consultancy firm must work very closely with the Director of the academy when drawing up all documents and tools, and key recommendations and proposed changes should be discussed and agreed with GEA and GIZ before being finalized.

The consultant shall apply a gender-responsive and socially inclusive approach throughout the assignment and ensure that all proposed governance arrangements, organisational structures, operational systems, policies, procedures, and any other developed document or tool promote equal opportunities, accessibility, and inclusive participation.

2. Tasks to be performed by the contractor

The contractor is responsible for providing the following services. All deliverables shall be provided in editable formats, use consistent terminology across work packages, and be designed for direct practical use by GEA. Drafts and key design decisions shall be discussed with the GEA Director and GIZ before finalisation.

Work Package 1: Inception and Review

The consultant will conduct a full review of the approved GEA Business Plan (MS Word text document and MS Excel financial plan) and all relevant project documentation. The purpose of the review is to assess whether the proposed business, institutional, governance, operational, and financial model is clear, realistic, and sufficient to support GEA's establishment and operations, and to identify any areas that require further development or revision.

The consultant will use the findings of this review and consultations with GEA and key stakeholders to confirm the approach and priorities for the subsequent work packages.

Key activities include:

- Review the GEA Business Plan, financial plan, market study, and relevant project documents.
- Consult with the Director of the Academy and key stakeholders (up to 10 people nominated by GIZ/GEA).
- Assess and validate the proposed business, governance, organisational, operational, and financial model, including Board, management, and stakeholder roles and relationships.
- Review the proposed services, market demand, and revenue opportunities.
- Identify gaps and required changes and provide recommendations for improvement.

Deliverables:

1. Inception and Business Plan Review Report
2. Detailed Work Plan and Implementation Methodology

Work Package 2: Service Portfolio Development and Commercial Positioning

The consultant will support GEA in operationalising and refining its fee-based service offerings to strengthen its market position and long-term financial sustainability. The work will build on the existing business plan and market study and focus on developing commercially viable services. For each priority fee-based service, the target client, scope/content, value proposition, delivery format, required resources/partners, key cost drivers, pricing logic and sales assumptions are to be defined. Regional positioning shall focus on the countries already covered by the market study and identify practical entry options, priority customer/partner types and major constraints; a new full market study is not required.

Key activities:

- Refine and package GEA's service streams, including target customer segments, value propositions, delivery models, and pricing approaches.

- Identify opportunities and strategic positioning for regional service expansion within the countries identified in the market study (Saudi Arabia, United Arab Emirates, Oman, Egypt, Kuwait, Qatar, and Bahrain).

Deliverables:

1. Service portfolio including commercial positioning in targeted countries and value proposition per service package
2. Fully developed and finalised service offerings including pricing and delivery model recommendations
3. Revised business plan (revised text document and MS Excel financial plans 2026-2028)

Work Package 3: Governance Framework

In close consultation with the Board and with the Director of the Academy the consultant will develop the institutional governance and organisational framework required to establish GEA as an independent, transparent, and accountable organisation, consistent with its legal structure and Business Plan. The governance framework shall translate the agreed legal and business model into workable decision-making arrangements, including Board composition and tenure principles, meeting/quorum arrangements, reserved matters, committee mandates, reporting, conflicts of interest, and approval/escalation paths where applicable. The organisational and staffing design shall distinguish Board oversight from management responsibilities and specify reporting lines, priority positions, recruitment sequencing and role profiles.

Key activities include:

- Develop the GEA Governance Charter including roles and responsibilities of shareholders, Board of Directors, committees, and management (Delegation of Authority Matrix and RACI)
- Develop the organisational structure and reporting lines
- Develop a staffing model and phased recruitment plan
- Prepare job descriptions for key positions

Deliverables:

1. Governance Charter
2. Organisational Structure Blueprint (including reporting hierarchy, Delegation of Authority and RACI Matrixes)
3. Staffing Model and Phased Recruitment Roadmap
4. Job descriptions for key positions

Work Package 4: Operational Systems, Policies, and Standard Operating Procedures

In close consultation with the Director of the Academy, the consultant will develop the operational systems, procedures, and policies required for the efficient day-to-day management of GEA, building on the governance and organisational framework developed under Work Package 3. Process mapping shall cover the end-to-end service/training cycle

(enquiry/proposal, contracting, scheduling, delivery, quality assurance, feedback, certification where applicable, and invoicing) and the main supporting HR, procurement, finance, contract administration and general administration processes. Policies and Standard Operating Procedures (SOPs) shall be implementation-ready, defining scope, responsibilities/process owner, steps, approvals, key controls, required records and linked templates. Digitalisation recommendations shall distinguish immediate low-complexity improvements from later system investments.

Key activities include:

- Map core institutional and operational processes.
- Develop the policies required for GEA's day-to-day operations, including Human Resources (HR) administration, procurement, financial management, contract administration, and other relevant operational areas.
- Develop process mapping covering the end-to-end service/training cycle
- Develop SOPs for core business operations.
- Develop the templates and tracking tools required to implement and monitor the procedures.
- Assess opportunities for digitalisation and automation of key operational processes and recommend appropriate systems or digital workflows to support efficient implementation and future growth.

Deliverables:

1. SOP Manuals
2. Institutional policies
3. Operational templates and tracking tools
4. Digitalisation and process automation recommendations

Work Package 5: Performance Management, Monitoring, and Institutional Sustainability Framework

In close consultation with the Director of the Academy, the consultant will establish a performance management and monitoring framework to enable GEA to measure institutional performance, support informed decision-making, and ensure long-term financial and organisational sustainability. For each Key Performance Indicators (KPIs), the calculation/assessment method, data source, owner, reporting frequency and target or target-setting approach shall be defined, supported by a simple management dashboard. Planning and review processes shall specify practical monthly, quarterly and annual routines, including data collection, management review, corrective action and Board reporting. The sustainability framework shall link to the revised 2026-2028 financial plan and identify key risks, mitigation measures and decision triggers.

Key activities include:

- Develop an institutional Performance Management Framework, incorporating balanced KPIs across financial, operational, and strategic domains
- Establish institutional planning, monitoring, and evaluation processes
- Formulate a financial and institutional sustainability framework, outlining funding models, risk mitigation, and long-term viability strategies
- Recommend mechanisms for continuous improvement, organisational learning, and periodic strategic review

Deliverables:

1. Comprehensive performance management & KPI framework
2. Monitoring and reporting manual
3. Institutional and financial sustainability strategy
4. Continuous improvement & strategic review framework

Work Package 6: Consolidation, Validation, and Handover

The consultant will consolidate all developed frameworks into a comprehensive institutional package and support GEA through the validation and handover process. The final package shall use a consistent structure and cross-reference the relevant policies, SOPs, matrices and templates. The validation workshop shall focus on resolving outstanding governance and operational decisions; the handover session shall use practical walkthroughs of key tools, roles and recurring management routines. Final source files shall be submitted in editable format with clear version control.

Key activities include:

- Consolidate all governance, organisational, operational, and monitoring documents into an integrated Institutional Framework Manual.
- Facilitate two (2) workshops: one to validate the developed institutional frameworks, processes, SOPs and tools with GEA consortium stakeholders, and one handover session with the GEA Director and management team to support their practical application and use.
- Revise and finalise all deliverables based on stakeholder feedback.

Deliverables:

1. Final Institutional Framework Manual.
 2. Presentation materials for the validation workshops.
 3. Validation and handover workshops report.
 4. Final assignment report and handover package.
- The contractor is responsible for selecting, preparing, training and steering the international and national, short and long-term experts assigned to perform the advisory tasks.
 - The contractor provides equipment and supplies (consumables) and assumes the associated operating and administrative costs.
 - The contractor manages costs and expenditures, accounting processes and invoicing in line with the requirements of GIZ.
 - The contractor reports regularly to GIZ in accordance with the current AVB of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH.

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

Milestones	Deadline/place/person responsible
WP1: Inception and Business Plan Review , including Inception and Business Plan Review Report, detailed work plan and implementation methodology	05.01.26 , Jordan / remote, Consultant

WP2: Service Portfolio and Commercial Positioning Package , including finalised service portfolio, commercial positioning and value propositions, pricing and delivery models, and revised Business Plan and financial plan (2026–2028)	15.02.2027 , Jordan / remote, Consultant
WP3: Governance and Organisational Framework , including Governance Charter, organisational structure, Delegation of Authority and RACI matrices, staffing model and phased recruitment roadmap, and job descriptions	01.04.27 , Jordan / remote, Consultant
WP4: Operational Systems, Policies and SOP Package , including SOP manuals, institutional policies, operational templates and tracking tools, and digitalisation/process automation recommendations	01.06.27 , Jordan / remote, Consultant
WP5: Performance Management and Institutional Sustainability Framework , including KPI framework, monitoring and reporting manual, institutional and financial sustainability strategy, and continuous improvement and strategic review framework	15.07.27 , Jordan / remote, Consultant
WP6: Consolidation, Validation and Handover , including final Institutional Framework Manual, validation workshops and report, final assignment report and handover package	31.07.27 , Jordan, Consultant

Period of assignment: from December 8th, 2026 until July 31st, 2027.

3. Concept

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

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

Technical-methodological concept

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

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

The tenderer is required to present and explain its approach to **steering** the measures with the project partners (1.3.1) and its contribution to a **results-based monitoring system** (1.3.2).

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

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

Project management of the contractor (1.6)

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

The tenderer is required to draw up a **personnel assignment plan** with explanatory notes that lists all the experts proposed in the tender; the plan includes information on assignment dates (duration and expert days) and locations of the individual members of the team complete with the allocation of work steps as set out in the schedule.

The tenderer is required to describe its backstopping concept. The following services are part of the standard backstopping package, which (like ancillary personnel costs) must be factored into the fee schedules of the staff listed in the tender in accordance with Section 3.1 of the GIZ AVB:

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

Further requirements (1.7)

The consultant shall apply a gender-responsive and socially inclusive approach throughout the assignment and ensure that all proposed governance arrangements, organisational structures, operational systems, policies, procedures, and any other developed document or tool promote equal opportunities, accessibility, and inclusive participation.

4. Personnel concept

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

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

Team leader

Tasks of the team leader

- Carry out the overall work for all work packages and take overall responsibility for the services delivered (quality and deadlines)
- Lead communication and consultations with the GEA Director, GEA Board, GIZ, and other relevant stakeholders.
- Provide technical leadership on the development of the governance, organisational, operational, performance management, and sustainability frameworks.

- Coordinate and supervise the inputs of the other expert involved in the assignment.
- Ensure that stakeholder feedback is appropriately incorporated into the deliverables.
- Lead the consolidation of the different outputs into the final Institutional Framework Manual.
- Lead the validation workshops, final handover, and orientation of the GEA Director and management team.
- Ensure timely delivery of all outputs in accordance with the agreed work plan and ToR requirements.

Qualifications of the team leader

- Education/training (2.1.1): university degree (German 'Diplom'/Master) in Business Administration, Public Administration, Organisational Development, Institutional Management, Economics, or a related field.
- Language (2.1.2): C1-level language proficiency in English- an exclusion criterion
- General professional experience (2.1.3): 7 years of professional experience in institutional development, organizational development, business planning, operations management, business process improvement, or quality management.
- Specific professional experience (2.1.4): 5 years of professional experience in developing institutional and governance frameworks, organizational structures, SOPs, institutional policies, performance management systems, commercially viable service portfolios, and/or institutional sustainability models.
- Leadership/management experience (2.1.5): 3 years of management/leadership experience as project team leader or manager in a company
- Regional experience (2.1.6): 2 years of working experience in the Gulf region and/or Middle East region, of which 1 year in Jordan, Palestine or Lebanon.
- Development cooperation (DC) experience (2.1.7): 2 years of experience in DC projects
- Other (2.1.8): Demonstrated experience integrating gender-responsive and socially inclusive approaches into institutional frameworks, policies, and organizational processes. Experience in the digitalization and/or automation of operational processes is an asset. Experience working with government institutions, universities, training institutions, or similar organizations is an asset.

Key expert 1

Tasks of key expert 1

- Lead the development of operational systems, processes, policies, and SOPs under Work Package 4.
- Support the Team Leader in all aspects of the Work Packs 1 to 6.
- Support the Team Leader in developing the performance management and monitoring framework, particularly operational KPIs, monitoring processes, and reporting mechanisms.
- Support the development of mechanisms for continuous improvement and organisational learning.
- Contribute to the consolidation of operational systems, policies, procedures, and tools into the final Institutional Framework Manual.
- Support the validation, handover, and orientation sessions related to the operational systems and tools developed under the assignment.

Qualifications of key expert 1

- Education/training (2.2.1): University degree (Bachelor's) in Business Administration, Management, Industrial Engineering, Quality Management, Organizational Development, or a related field. A Master's degree is an asset.
- Language (2.2.2): C1 -level language proficiency in English- an exclusion criterion
- General professional experience (2.2.3): 5 years of professional experience in operations management, business process management/improvement, quality management, or organizational operations.
- Specific professional experience (2.2.4): 3 years of experience developing operational systems, business processes, SOPs, institutional policies, process maps and workflows, and/or quality management systems.
- Development Cooperation (DC) experience (2.2.7): 2 years of experience working on development cooperation projects.
- Other (2.2.8): Demonstrated experience integrating gender-responsive and socially inclusive approaches into operational systems, institutional policies, and organizational processes. Experience in the digitalization and/or automation of operational processes is an asset.

Soft skills of team members

In addition to their specialist qualifications, the following qualifications are required of team members:

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

5. Costing requirements

Assignment of personnel and travel expenses

Per diem allowances are reimbursed as a lump sum up to the maximum amounts permissible under tax law for each country as set out in the country table in the circular from the German Federal Ministry of Finance on travel expense remuneration (downloadable from the [German Federal Ministry of Finance – tax treatment of travel expenses and allowances for international business travel as of 1 January 2026 \(GERMAN ONLY\)](#)).

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

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

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

Sustainability aspects for travel

GIZ has undertaken an obligation to reduce greenhouse gas emissions (CO₂ emissions) caused by travel. When preparing your tender, please incorporate options for reducing emissions, such as selecting the lowest-emission booking class (economy) and using means

of transport, airlines and flight routes with a higher CO₂ efficiency. For short distances, travel by train (second class) or e-mobility should be the preferred option.

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

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

Specification of inputs

Fee days	Number of experts	Number of days per expert	Total	Comments
Designation of TL	1	45	45	
Designation of key expert	1	32	32	
Travel expenses	Quantity	Number per expert	Total	Comments
Per-diem allowance in country of assignment	2	10	20	
Overnight allowance in country of assignment	2	8	16	Overnight stays abroad: Note: Under the BMF travel expense regulations, overnight allowances not exceeding 100% of the lump sum amounts can be submitted for reimbursement against evidence. Up to 75% of the maximum rates specified in the travel expense regulations can be submitted for reimbursement on a lump-sum basis. Please indicate in the price schedule whether your offer is on a lump-sum basis or against evidence. Overnight stays in Germany (deviation from the travel expense regulations): Note: Overnight allowances of up to EUR 130 can be submitted for reimbursement against evidence. Up to EUR

				80 can be submitted for reimbursement on a lump-sum basis. Please indicate in the price schedule whether your offer is on a lump-sum basis or against evidence.
Transport	Quantity	Number per expert	Total	Comments
International flights to Jordan	2	2	4	Travel to the place of service delivery in Jordan
CO ₂ compensation for air travel	1	1	1	A fixed budget of EUR 100 is earmarked for settling carbon offsets against evidence.
Travel expenses (train, car) Car (in Jordan), public transport (in country of origin)	2	2	4	Lumpsum amount of travel within the country of assignment, transfer to/from airport etc.
Other Travel Expenses	2	1	2	Visa fees
Other costs	Number	Price	Total	Comments
Flexible remuneration	1	1	1	A budget of EUR EUR 7.500 is foreseen for flexible remuneration. Please incorporate this budget into the price schedule. Use of the flexible remuneration item requires prior written approval from GIZ.

Workshops, events and trainings

The contractor implements the following workshops. GIZ will manage the logistics and covers the costs of the workshops, the contractor is expected to prepare any digital material and presentations and to facilitate the workshop:

- Validation workshop
- Handover workshop

6. Inputs of GIZ or other actors

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

- Logistics for workshops: 2 workshops

7. Requirements on the format of the tender

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

The complete tender must not exceed 15 pages (excluding CVs). If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment. External content (e.g. links to websites) will also not be considered.

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

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