

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

CONFIDENTIAL

Project title:	Processing number/cost centre:
Sustainable Urban Development (DUS) III	G-012325-001
Country:	Internal order:
Brazil	12325030000
Subject of the tender procedure:	Tender number:
Technical Services to Strengthen Integrated, Inclusive and Climate Justice-Oriented Urban Development in Brazil	10047662

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0. List of abbreviations

ANDUS	Apoio à Agenda Nacional de Desenvolvimento Urbano no Brasil (Support to the National Urban Development Agenda in Brazil).
AV	Gestor da Comissão (Commission Manager).
BMZ	Ministério Federal para Cooperação Econômica e Desenvolvimento da Alemanha (Federal Ministry for Economic Cooperation and Development).
CSO	Organizações da Sociedade Civil (Civil Society Organizations).
DUS	Desenvolvimento Urbano Sustentável (Sustainable Urban Development).
FMB	Departamento Setorial da GIZ / <i>Fach- und Methodenbereich</i> (GIZ Sectoral Department).
FNP	Frente Nacional de Prefeitas e Prefeitos (National Front of Mayors).
GDPR	Regulamento Geral sobre a Proteção de Dados da União Europeia (General Data Protection Regulation).
GHG	Gases de Efeito Estufa (Greenhouse gases).
GIZ	<i>Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH.</i>
GTC	Termos e Condições Gerais de Contrato da GIZ (General Terms and Conditions of Contract).
IBGE	Instituto Brasileiro de Geografia e Estatística (Brazilian Institute of Geography and Statistics).
InREDE	Rede Brasileira de Institutos de Planejamento (Brazilian Network of Planning Institutes).
IUD	Desenvolvimento Urbano Integrado (Integrated Urban Development).
KOMP	Monitoramento e previsão de custos por produto (Cost per output monitoring and forecast).
LED	Desenvolvimento Econômico Local (Local Economic Development).
LFU	Liderança Feminina Urbana (Urban Female Leadership Network).
LGPD	Lei Geral de Proteção de Dados (Brazilian Data Protection Law).
LOI	Carta de Intenção (Letter of intent).
MCID	Ministério das Cidades (Ministry of Cities - Brazil).

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MoU	Memorando de Entendimento (Memorandum of Understanding).
NbS	Soluções Baseadas na Natureza (Nature-based Solutions).
PES	Pagamento por Serviços Ambientais (Payment for Environmental Services).
PPPs	Pagamento por Serviços Ambientais (Payment for Environmental Services).
ReDUS	Rede para o Desenvolvimento Urbano Sustentável (Network for Sustainable Urban Development).
RePV	Rede Periferia Viva (Periphery Alive Network).
RMO	Escritório de Gestão de Riscos (Risk Management Office).
SNDUM	Secretaria Nacional de Desenvolvimento Urbano e Metropolitano (Secretariat for Urban and Metropolitan Development).
SNP	Secretaria Nacional de Periferias (Secretariat for Peripheries).
ToRs	Termos de Referência (Terms of reference).
VgV	Portaria Alemã sobre a Adjudicação de Contratos Públicos (German Ordinance on the Award of Public Contracts).

1. Context

Brazil is a highly urbanized country, with approximately 85% of its population living in urban areas. Despite this, urbanization has occurred in a deeply unequal manner, marked by strong social, economic and territorial disparities. According to the most recent data from the Brazilian Institute of Geography and Statistics (IBGE), around 15% of the urban population lives below the national poverty line. By 2020, Brazil had more than 13,000 informal settlements (favelas and urban communities), distributed across 734 municipalities in all states and the Federal District.

Two types of urban territories concentrate the most severe structural vulnerabilities: (i) urban peripheries, particularly in metropolitan regions, and (ii) cities in the Amazon region. In the North of Brazil, which encompasses most of the Amazon, urban infrastructure deficits are significantly higher than the national average. Only 17% of urban households have access to sewage networks, compared to 52% in the rest of the country, and only 13% have access to broadband internet, compared to 53% nationally. These deficits limit access to basic services, economic opportunities and institutional capacities at the local level.

Both urban peripheries and Amazonian cities are also disproportionately exposed to the impacts of climate change, including floods, droughts and extreme rainfall events. These conditions reduce their capacity to adapt to climate risks and to contribute to greenhouse gas mitigation efforts. In addition, the lack of economic opportunities in Amazonian cities contributes to the expansion of illegal activities with negative impacts on forest conservation and associated emissions, while infrastructure deficits in urban peripheries reinforce cycles of exclusion and informality. Within the scope of the “Sustainable Urban Development III in Brazil” (DUS III) project, these two territorial contexts are therefore considered as “marginalized urban areas”.

The bilateral cooperation project DUS III (12/2025 – 11/2028) aims to strengthen the implementation of integrated, inclusive and climate justice-oriented urban development in marginalized urban areas in Brazil. The project builds on a multi-level approach, working with actors at local and national levels, with a focus on urban peripheries in metropolitan regions and cities in the Amazonian region. The selection of partner cities and areas of intervention will be carried out jointly with the Brazilian Ministry of Cities (MCID), based on predefined technical criteria.

At the institutional level, a central challenge lies in the structural weaknesses and limited contextualization of national urban development policies when applied to marginalized territories. Urban policy in Brazil has historically concentrated on large and medium-sized cities, particularly in the South and Southeast regions, which has contributed to regional imbalances and reduced the effectiveness of policy instruments in disadvantaged regions and urban peripheries. These limitations affect socio-economic inclusion, climate resilience and the capacity of local actors to engage meaningfully in urban development processes.

The DUS III project addresses these gaps by promoting cooperative governance approaches, strengthening the role of civil society, and supporting the participation and leadership of women and black people. It also emphasizes the development of scalable approaches, institutional learning and capacity development across different governance levels. Strengthening cooperation mechanisms, data systems, methodologies and monitoring tools is essential to

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ensure that national policies and programs can be adapted, implemented and scaled in ways that respond to diverse urban realities, particularly in marginalized contexts.

DUS III constitutes a continuation and further consolidation of previous cooperation initiatives. It builds on the results of the “Sustainable Urban Development II (DUS II)” project, implemented from December 2021 to November 2025, which focused on strengthening framework conditions for integrated, inclusive, and climate-resilient urban development¹. It also draws on the experience and outputs of the project “Support to the National Urban Development Agenda in Brazil (ANDUS)”, implemented between July 2017 and December 2025. The DUS III project is aligned with the BMZ 2030 Strategy “Climate and Energy – Just Transition”, under which sustainable urban development is defined as a key area of action.

The main objective of this project is to support the implementation of activities that strengthen integrated, inclusive and climate justice-oriented urban development in Amazonian cities and in urban peripheries in Brazil.

To achieve this objective, the DUS III project operates in the following areas / components:

1. Support integrated and inclusive urban development to promote economic opportunities in Amazonian cities.
2. Support integrated and inclusive urban development in urban peripheries; and
3. Support national programs and governance structures to replicate local approaches.

The project operates at national and subnational levels and is structured into three components. Components 1 and 2 are implemented at the subnational level - Component 1 focuses on cities in the Amazonian region, while Component 2 addresses urban peripheries. Component 3 operates at the national level, focusing on interaction with urban networks, subnational and national institutions and contributing to the overall strategic framework of the project. Cities in the Amazon region are selected for the implementation of Output 1, and urban peripheries are selected for the implementation of Output 2.

All project activities are co-coordinated with the MCID within formal international cooperation processes. From a technical perspective, the project is implemented in cooperation with the Secretariat for Urban and Metropolitan Development (SNDUM, in Portuguese), which leads Output 1, and the Secretariat for Peripheries (SNP, in Portuguese), which leads Output 2. Other MCID secretariats and additional national structures are involved where relevant to ensure the effective achievement of the project objective.

¹ More information [here](#):

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2. Tasks to be performed by the contractor

2.1 Term

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.

2.2 Objectives, indicators, work packages, milestones

The main objective of DUS III project is to strength the implementation of integrated, inclusive and climate justice-oriented urban development in marginalised urban areas in Brazil. The project has three outcomes, and the contractor will contribute to each of them as described below:

Outcome 01: In three (3) pilot cities, sub-measures from demonstration projects for urban development* were implemented in marginalized urban areas, two of which focused on gender and racial equality. The contractor is responsible to the achievement of the indicator.

Outcome 02: Two (2) national urban development* programs in urban peripheries were adapted based on the results of local monitoring. The contractor contributes to the achieving of the indicator.

Outcome 03: One (1) financing mechanism for urban development* that incorporates tailored criteria to improve access for cities in the Amazonian region. The contractor is responsible to the achieving of the indicator.

In addition, the activities under this assignment contribute to the achievement of three specific project objectives, as presented below.

Output 01: The institutional capacities of selected cities in the Amazon region to implement integrated, inclusive, and climate justice-oriented urban development are strengthened. The contractor **is responsible** to the achievement of the output.

Output 02: The institutional capacities of selected cities in urban peripheries to implement integrated, inclusive, gender-responsive, and climate justice-oriented urban development are strengthened. The contractor **is responsible** to the achievement of the indicator.

Output 3: Mechanisms for vertical and horizontal upscaling of good practices for integrated, inclusive and climate justice-oriented urban development in marginalised urban areas are established. The contractor **contributes to** the achieving of the output by providing relevant data and evidence-based policy recommendations, also supporting to strength local urban networks.

The contractor is responsible for providing the work packages described below, delivering the corresponding outputs, and achieving the respective milestones. In addition, the contractor will systematically compile, organize, and submit all materials produced throughout the project cycle, including technical reports, descriptive documents, technical designs, budget estimates, regulatory and planning instruments, communication materials, and records of stakeholder engagement and participatory processes. All deliverables and supporting documentation shall be provided in open and editable digital formats.

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The structure of the work packages presented in this ToR understand that the contributions of the contractor to Output 3 are direct results from the implementation of activities under Component 1 and 2. Therefore these tasks, milestones and deliverables have been included in Work packages 1 and 2.

The review and technical approval process for the deliverables includes an assessment by the responsible GIZ Team (technical advisor and/or project coordination). Payments will be made after approval of the respective deliverables, and submission of the corresponding invoice.

Work package 1 - WP1 (part of Output 1 and 3, Indicators 1.1, 1.2, 3.1, 3.2): Amazonian cities

It focuses on supporting the development, technical consolidation, and implementation of integrated urban development demonstration projects in Amazonian cities, as well as on establishing mechanisms for the vertical and horizontal scaling of good practices.

WP1 includes activities at the subnational (municipal and state-level), and national levels, contributing to the following outputs and outcomes of the Component 01 and 03 of DUS III.

- Support three (3) integrated urban development demonstration projects in Amazonian municipalities.
- Support with up to five (5) decentralized technical assistance services to municipalities through subnational (state-level) organizations.
- Contribute one evidence-based policy recommendation on financing for integrated urban development in Amazonian cities.
- Support one adapted financing mechanism to improve access to urban finance for Amazonian municipalities.

At the **municipal level (subnational) (Output 1.1)**, GIZ has established a selection process to identify partner municipalities in Amazon region for the development of demonstration projects focused on integrated urban development and local economic development, including the preparation of financing concepts and a cooperation with private sector actors.

The selection process is structured in two phases:

- Phase 1: Selection of municipalities in the Brazilian Amazon through a public call launched by GIZ and the Ministry of Cities (MCID) for the development of conceptual proposals for integrated urban development demonstration projects. This phase identifies the territories supported through a mentoring and peer-learning process for the subsequent technical development stage. (August 2026 – Lead by GIZ)
- Phase 2: Technical development of three (3) selected demonstration projects, including the preparation of detailed technical designs, financing strategies, and implementation arrangements. The CONTRACTOR will further develop and strengthen the selected demonstration projects, refining the proposed interventions to integrate the principles of local economic development, climate justice, and social inclusion to the specific context of Amazonian cities. (2027–2028 – Led by Contractor).

At the **state-level (subnational) (Output 1.2)**, GIZ has engaged selected state-level and regional institutions with the potential to provide technical assistance on integrated urban

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development for the Amazonian context. The contractor will be responsible for further assessing and, if necessary, expanding this network, as well as organize and implement decentralized technical assistance services.

At the **national level (Output 3.2 and Outcome 3)**, GIZ, in coordination with the Ministry of Cities and other relevant partners, is advancing the identification and enhancement of financing mechanisms to improve access to urban finance for Amazonian municipalities. The contractor will be responsible for mapping, analyzing, developing, recommending, and adapting a financing mechanism to improve access conditions for cities in the Amazon region. The CONTRACTOR will also develop evidence-based policy recommendations for the MCID to strengthen urban financing policies and instruments for Amazonian cities.

The activities, products, results, and longer-term impacts generated under WP1 shall systematically inform the development of evidence-based tools, monitoring systems, and policy recommendations at the national level.

Activities – Municipal Level (subnational)

- Technical development of three (3) demonstration projects in selected Amazonian cities, in cooperation with private sector, ensuring alignment with applicable regulatory, technical, and operational requirements².
- Develop technical designs, executive plans, and any complementary studies required for the implementation of integrated urban interventions.
- Apply gender-sensitive and anti-racist approaches throughout the implementation of demonstration projects, ensuring the integration of inclusive and climate justice-oriented solutions.
- Define governance models and institutional arrangements to support the coordination, implementation, and long-term sustainability of the demonstration projects.
- Conduct economic and financial analyses, including the identification of financing sources, instruments and propose measures to ensure project bankability.
- Integrate local economic development strategies into the demonstration projects by identifying sustainable economic opportunities aligned with the territorial context of Amazonian cities, engaging private sector actors, promoting local value chains and partnerships, and strengthening the long-term viability of integrated urban development interventions.
- Develop and implement monitoring and learning approaches, including the definition of indicators and the systematization of results.
Facilitate knowledge exchange, dissemination of results, and the development of communication and decision-support materials.

² It would be beneficial to broaden the definition to explicitly encompass the popular economy and local micro-entrepreneurs, ensuring that financing strategies and demonstration projects are designed to be inclusive of businesses operating at this scale. See the "Definition List" Annex.

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Milestones for work package 1 / part of Output 1.1	Delivery period
One (1) report with the review of existing project proposals, diagnostic and key findings for each of the three demonstration projects	2 months after the start of the contract
One (1) report with the methodological approach and work plan for the development of each of the three demonstration projects (3)	3 months after the start of the contract
Interactive Operational Flowchart (Monitoring Dashboard): A visual tool enabling to monitor the project activities and impacts. The first dashboards (Months 2, 4 and 6 – to be confirmed) shall focus on monitoring activities and implementation processes (inputs/processes), whereas impact monitoring shall only commence following the validation of the Monitoring Plan.	Every two-months from the start of the contract
Three (3) socio-territorial and inclusion assessments report one <u>for each demonstration project</u> , including the socio-territorial assessment report, gender and race assessment and the community engagement	5 months after the start of the contract
Three (3) Financing Diagnostic one <u>for each demonstration project</u> , including the mapping and analysis of financing instruments and sources, the identification of access barriers, opportunities and the initial assessment of project bankability.	6 months after the start of the contract
Three (3) participatory <u>workshop one for each demonstration project</u> to support the development of integrated urban development* demonstration projects, including the agendas, methodologies, facilitation materials, the documentation of workshops and the consolidated report summarizing contributions from stakeholders and their integration into project development.	Month 6 to 10 after the start of the contract
Three (3) Action Plans one <u>for each demonstration project</u> , including the <ul style="list-style-type: none"> - intervention plan - communication plan - participation, gender and human rights plan - local economic opportunities and support private sector engagement - monitoring and continuous improvement plan - integration of the financing plan into the project. 	10 months after the start of the contract

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Three (3) Financing Plan with the strategy and concepts one for each demonstration project.	10 months after the start of the contract
Three (3) Booklets: should serve as rapid communication tool aimed at engaging external partners, publicizing project information, and highlighting the most relevant and impactful data and visuals.	First draft: 10 months after the start of the contract Final Version: 16 months after the start of the contract
Three (3) Master Plan (Project Dossier - Memorial): Compilation of all descriptive texts, technical designs, financial strategies, preliminary budget, regulatory framework, governance arrangements, social participation processes, and gender- and race-sensitive and climate justice considerations developed throughout the project cycle.	16 months after the start of the contract
A guideline for integrated urban development interventions in Amazonian Cities	16 months after the start of the contract
Three (3) Booklet with the evidence packages, impact documentation and scaling strategy one for each demonstration project.	16 months after the star of the contract

Activities - State-Level (subnational):

- Develop the scope, methodology, technical content, and implementation approach for up to three (3) technical advisory services to be delivered by state-level (subnational) organizations, in coordination with MCID, GIZ, and partner institutions.
- Provide technical guidance for the implementation of up to three (3) technical advisory services delivered by state-level (subnational) organizations, including quality assurance, technical backstopping, monitoring of implementation, and documentation of lessons learned.
- Develop a framework model for decentralized technical assistance in integrated urban development for Amazonian cities based on the experience of implementation and lessons learned from up to three (3) technical advisory services delivered by state-level (subnational) organizations.

Milestones for work package 1 / part of Output 1.2	Delivery period
Up to 3 (three) concept notes with the definition and structuring of technical advisory services for Amazonian cities (including details on the scope, objectives, target groups, methodology, expected results) that will be implemented by the state-level organizations	Month 6 to 15 after the start of the contract
Technical guidance provided for the implementation of the up to 3 (three) advisory services and the documentation of lessons learned	Month 6 to 15 after the start of the contract

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1 (one) report with the framework model for decentralized technical assistance in integrated urban development* for amazon cities	12 months after the start of the contract
1 (one) Final report and a presentation of the systematizing results, lessons learned, and recommendations for policy improvement and scaling at the federal level	15 months after the start of the contract

Activities - National Level:

- Develop evidence-based policy recommendations for the Ministry of Cities (MCID) to strengthen financing mechanisms for integrated urban development in Amazonian cities.
- Provide technical advisory to the Ministry of Cities (MCID) on financing mechanisms for integrated urban development in Amazonian cities, including innovative financing instruments such as public-private partnerships (PPPs), securitization, and blended finance.
- Support the GIZ team in disseminating practical tools for integrated urban development in amazonian cities based on evidence from local implementation, best practices, and methodologies.
- Support the GIZ team in strengthening municipal networks to promote knowledge exchange, dissemination of tools, and replication of good practices.
- Support the GIZ team in engaging and collaborating work with subnational and national networks to validate policy recommendations
- Systematize lessons learned and good practices from the implementation of the Amazonian Cities work package.
- Develop strategic communication and knowledge products (e.g., dashboards, infographics, and storytelling materials) to support knowledge dissemination and evidence-based decision-making.

Milestones for work package 1 / part of Output 3.2	Delivery period
One (1) technical and strategic policy recommendation documents for the Ministry of Cities (MCID), based on evidence generated throughout the project focused on financing mechanisms for Amazonian cities.	12 months after the start of the contract
Strategic communication and decision-support materials - Visual and analytical products (infographics, reports, presentations) on financing opportunities and access gaps	Month 6 to 15 months after the start of the contract
Technical Report on Financing Instruments: analysing financing instruments and mechanisms, including approaches such as PPPs, securitization, and other relevant mechanisms.	16 months after the start of the contract
Delivery of at least four (4) collaborative workshops with subnational and/or national networks aimed to disseminate practical tools,	Throughout implementation, with consolidated reporting at 6, 12 and 16 months after the start of the contract

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<p>policy recommendations, and strategic findings. For each workshop, the CONTRACTOR shall prepare a summary report compiling the main discussions, key findings, and validated recommendations.</p> <p>For each workshop, the CONTRACTOR shall the agenda, methodologies, facilitation materials, the documentation of workshops and the consolidated report summarizing contributions from stakeholders</p>	
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Activities - Financing Mechanism for Amazonian Cities

- Articulate with relevant public, private, and development finance institutions to identify financing opportunities for integrated urban development in Amazonian cities.
- Assess existing urban development financing mechanisms and identify barriers and opportunities to improve access for Amazonian cities, considering and further developing previous studies, analyses, and technical evidence produced under GIZ projects.
- Conduct technical, financial, and institutional analyses to identify barriers, enabling conditions, and tailored criteria for adapting one urban development financing mechanism to improve access for Amazonian cities.
- Develop a technical proposal for the adaptation of a financing mechanism for urban development, including tailored eligibility criteria, financing conditions, governance arrangements, and implementation requirements for Amazonian cities.
- Facilitate technical dialogue and co-creation processes with financial institutions and other relevant stakeholders to validate and refine the proposed adaptation.
- Provide technical advisory throughout the adaptation process, incorporating evidence from project implementation, stakeholder consultations, and lessons learned to support the operationalization of the adapted financing mechanism.

Milestones for work package 1 / Outcome 3	Delivery period
One (1) Stakeholder mapping and engagement plan identifying relevant financing institutions, engagement strategy, and key opportunities for collaboration.	3 months after the start of the contract
One (1) technical analysis report presenting the barriers, enabling conditions and adaptation criteria for one urban development financing mechanism for Amazonian cities.	6 months after the start of the contract
One (1) technical proposal for the adaptation of one financing mechanism for urban development tailored to Amazonian cities.	8 months after the start of the contract
Delivery of at least two (2) validation workshop(s) and consolidated recommendations for the proposed financing mechanism. For each workshop, the CONTRACTOR shall prepare the agenda, methodology, facilitation materials, and a summary report documenting the main	Throughout implementation, with consolidated reporting at 6 and 12 months after the start of the contract

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discussions, stakeholder contributions, key findings, and validated recommendations.	
One (1) final financing mechanism adaptation package, incorporating validated technical recommendations, implementation considerations, and supporting documentation.	16 months after the start of the contract

Work package 2 – WP2 (Outcome 1 and Outcome 2 - part of Output 2, Indicator 2.1 and Output 3, Indicator 3.2): Urban peripheries

It focuses on supporting the development, technical consolidation, and implementation of integrated urban development demonstration projects in urban peripheries, as well as on strengthening cooperation mechanisms between public authorities and civil society and generating evidence to inform public policies and scaling-up processes.

WP2 includes activities at the local and national levels, contributing to the following:

- Support three (3) integrated urban development demonstration projects in urban peripheries.
- Support cooperation mechanisms between public authorities and civil society, with a focus on inclusive participation.
- Support monitoring and learning approaches to assess the impacts of demonstration projects and public policies in urban peripheries.
- Support evidence-based policy recommendations and the improvement of national programmes related to urban peripheries.

At the **local level**, GIZ, in coordination with the MCID, has established a selection and mentoring process to identify and support the development of demonstration projects focused on integrated urban development in peripheries, including the integration of climate adaptation and nature-based solutions. The selection process is structured in two phases³:

- Phase 1: Selection of demonstration projects from “Nature-based Solutions in Urban Peripheries Network”, established through a public call launched by the MCID, for the refinement of conceptual proposals and a pilot implementation. This phase identifies the territories supported through a mentoring and peer-learning process and prepare them for the subsequent technical development stage. (2026 – Led by GIZ).
- Phase 2: Technical development of three (3) selected demonstration projects, including the preparation of detailed technical designs, financing strategies, and implementation arrangements. The Contractor will further develop and strengthen the selected projects

³ Phase 1 is led and implemented by GIZ, including the selection of territorial project proposals. The contractor is not involved in this phase. The contractor's scope of services focuses on Phase 2, where technical and methodological support is provided for the development of selected projects, including their technical consolidation and implementation readiness.

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while adapting the proposed interventions for application at the broader macro-area scale and enhancing their scaling-up potential. (2027–2028 – Led by Contractor).

At the **national level**, supports the generation and systematization of evidence from demonstration projects to inform national public policies and implementation strategies. The contractor shall be responsible for supporting the systematization of lessons learned, contributing to the development of evidence-based policy recommendations, and supporting the identification of regulatory improvements, monitoring approaches, and scaling mechanisms.

Activities - Municipal Level

- Technical development of three (3) demonstration projects in selected urban peripheries, in cooperation with civil society organizations (CSOs), ensuring alignment with applicable regulatory, technical, and operational requirements.
- Prepare technical designs, executive plans, finance mechanisms and complementary studies required for the implementation of integrated urban and NbS interventions.
- Development of Nature-based Solutions (NbS) concepts and implementation strategies within the framework of the “Nature-based Solutions in Urban Peripheries Network”, including the identification, adaptation, and application of methodologies, technical standards, and planning tools suitable for marginalized urban areas.
- Support strengthening the “Nature-based Solutions in Urban Peripheries Network” as a technical platform for peer learning, capacity development, and knowledge exchange, facilitating the dissemination of methodologies, lessons learned, and practical experiences from demonstration projects to foster the replication and scaling-up.
- Establish and strengthen cooperation mechanisms between public authorities and civil society, including participatory approaches.
- Apply gender- and race-sensitive approaches to the design and implementation of demonstration projects, ensuring the integration of inclusive and climate justice-oriented solutions.
- Develop economic and financial analyses, including the identification of financing sources and instruments, with consideration of innovative mechanisms such as Payment for Environmental Services (PES) and other nature-based financing approaches, as appropriate.

Activities - National Level

- Develop and implement monitoring approaches, including the definition of indicators and the systematization of results.
- Develop evidence-based outputs, including policy recommendations, technical inputs to the improvement of national programmes related to urban peripheries, and contributions to their long-term sustainability strategies (e.g. governance arrangements, partnerships, and institutional models beyond 2028).
- Support knowledge exchange, dissemination of results, and the development of communication and decision-support materials.
- Disseminate practical tools for integrated urban development in marginalized urban areas, based on evidence from local implementation, best practices, and participatory methodologies.

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- Develop and refine monitoring systems to track the implementation of public policies, programmes, and financing instruments in marginalized areas.
- Conduct user testing of the monitoring tool, systematically collect user feedback and recommendations, document identified limitations, and consolidate prioritized improvements for incorporation into the final version of the monitoring dashboard.

Milestones for work package 2 / part of <i>Outcome 1 and 2</i>	Delivery date/period
One (1) report with the review of existing projects proposals, diagnostic and key findings for each of the three demonstration projects	2 months after the start of the contract
Interactive Flowchart (Monitoring Dashboard): A visual tool enabling to monitor the project actions, activities and impacts. The first dashboards (Months 2, 4 and 6 – to be confirmed) shall focus on monitoring activities and implementation processes (inputs/processes), whereas impact monitoring shall only start following the validation of the Monitoring Plan.	Every two-month from the start of the contract
Nine (9) participatory <u>workshop – three for each demonstration project</u> to support the development of integrated urban development* demonstration projects, including the agenda, methodologies, facilitation materials, the documentation of workshops and the consolidated report summarizing contributions from stakeholders and their integration into project development	Month 6 to 14 after the start of the contract
Three (3) socio-territorial and inclusion assessments report one <u>for each demonstration project</u> , including the socio-territorial assessment report, gender and race assessment and the community engagement	6 months after the start of the contract
Three (3) Booklets <u>for each demonstration project</u> : should serve as rapid communication tool aimed at engaging external partners, publicizing project information, and highlighting the most relevant and impactful data and visuals	First draft: 12 months after the start of the contract Final Version: 16 months after the start of the contract
Three (3) Master Plan (Project Dossier - Memorial) <u>for each demonstration project</u> : Compilation of all descriptive texts, technical designs, financial strategies, preliminary budget, regulatory framework, governance arrangements, social participation processes, and gender- and race-sensitive and climate justice considerations developed throughout the project cycle	16 months after the start of the contract

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A guideline for Micro and Upscaling NbS Interventions	16 months after the start of the contract
Evidence-Based Policy Recommendations document with regulatory frameworks and guidelines for national support programs. This includes: one recommendation focused on monitoring systems for urban peripheries.	First draft: 12 months after the start of the contract Final Version: 17 months after the start of the contract
Technical Report on Financing Instruments: analysing financing instruments and mechanisms, including approaches such as PES, and other climate mechanisms.	16 months after the start of the contract

2.3 Project and knowledge management requirements

Overall GIZ contribution:

GIZ accompanies, supports and approve the implementation of the activities described in this document in close coordination with the political partner and provides the necessary support to enable the effective implementation of the assignment. GIZ ensures the technical and strategic alignment of the activities with the objectives of the DUS III project and facilitates coordination among relevant stakeholders.

- Provision of available project-related information and documentation, including project materials, previous studies, data, and reports.
- Strategic coordination of the project in alignment with the objectives of the DUS III programme and in close consultation with MCID.
- Coordination with the political partner and other relevant institutions to ensure alignment of project activities with urban development policies and programmes.
- Support the engagement of participating cities, including the establishment of selection criteria for demonstration projects in the Amazon region and urban peripheries, in coordination with MCID.
- Identification and engagement of municipal networks and other relevant institutional partners to support knowledge exchange, dissemination, and scaling-up processes.
- Facilitation of access to political dialogue processes, including interministerial coordination mechanisms and policy discussion platforms relevant to the project.
- Provision of strategic guidance and technical inputs to ensure alignment with the broader GIZ urban development portfolio and cooperation priorities.
- Promotion of coordination and synergies with other initiatives and projects implemented by GIZ and partner institutions.
- Review, feedback, validation, and timely approval of key deliverables and products.

The selected cities and territories will be communicated to the contractor and project partners during the kick-off meeting with the contractor.

Requirements on the assignment of experts:

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- The contractor is responsible for the realisation of two work packages that contribute to the achievement of the module's objective in a cross-cutting manner
- The contractor is responsible for selecting, preparing, training and steering the experts assigned to carry out the advisory services. Likewise, ensure an appropriate balance between gender and age diversity among the select expert.
- Ensure active participation in meetings and presentations with technical staff and decision-makers at subnational and national levels.
- Systematically incorporate local socio-environmental knowledge specific to the respective local and institutional context.
- Carry out the activities in close coordination with decision makers of different levels teams and relevant stakeholders.
- For each task, the contractor shall deliver both a technical product and a presentation summarizing the results and/or process. All presentations shall be concise, visually clear, and oriented towards supporting technical dialogue, decision-making and to be delivered at events.
- The format of the deliverables shall be defined with GIZ, ensuring objective, clear, and engaging communication. This includes the provision of editable format digital files, including all source files, to allow further use, adaptation, and integration.
- The contractor shall work in close coordination with the GIZ technical team throughout the preparation, review, and finalisation of all deliverables. The review and approval process shall be carried out jointly with GIZ, which will provide technical feedback, validate the quality of the outputs, and formally approve the final deliverables.

Requirements on materials and equipment and operating costs:

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

Requirements on expenditure management and cost control:

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

Information on cost-output monitoring (KOMP):

- To enable cost-output monitoring (KOMP), the contractor must implement rigorous expenditure management. The contractor's invoices must present fees and travel expenses clearly separated and allocated by Output: Output 1 (45%), Output 2 (35%), or Output 3 (20%).

Monitoring and reporting requirements:

- The contractor plays an active role in the results-based monitoring of the project. Regular monitoring activities must cover at least the following:
 - Degree to which activities are implemented (initial situation, progress, and status quo);

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- Degree to which the objectives, indicators and milestones listed in section 2.2 of these ToRs have been achieved;
- Results (impacts) that have occurred in the contractor's sphere of responsibility;
- Results (impacts) that have occurred outside the contractor's direct sphere of responsibility, but are related to implementation;
- Data for the project's standard indicators (political participation; greenhouse gas emissions mitigation; climate change adaptation; improved urban infrastructure systems or services);
- Report risks and implement mitigation actions.

The contractor reports to GIZ as follows: Instead of the reporting language stipulated in GIZ's General Terms and Conditions of Contract (German), the contractor provides the following reports in the following language: Portuguese and shall be submitted in electronic version (Regular reports and technical deliverables). Selected knowledge products and dissemination materials for global networks may be requested in English.

- Inception report: 20 calendar days after contract award. The report shall consist of approximately 20 pages and include a detailed Activity Planning Report (Work Plan), a Gantt chart, a quality assurance and deliverables review process (including roles, responsibilities and approval procedures), and a roles and responsibilities matrix for the implementation of the assignment;
- Interim report(s) on:
 - July, 30, 2027: First progress report covering results from March 2027 to June 2027
 - December, 15, 2027: Second progress report covering results from July 2027 to December 2027
 - June, 2028: Technical draft of the final report for GIZ review.
- Final report on August, 31, 2028.

The interim report(s) and the final report should provide information about the progress made towards objectives in each of the monitoring areas specified above. In general, the reports shall describe and critically reflect upon the work implemented and the results generated and include qualitative as well as quantitative information and evidence.

The contractor shall provide information required by GIZ's results-based monitoring system. The monitoring shall be conducted in accordance with the methodologies and tools selected by GIZ and in line with GIZ' reporting requirements.

Additionally, the contractor is required to produce:

- Contributions to the report to GIZ's commissioning party: The contractor shall provide technical inputs for GIZ's progress reports to the BMZ twice a year, typically in January and July, with approx. 5-10 pages focusing on indicator achievement and impact stories.
- Brief quarterly or half-yearly reports on the implementation status of the project (5-7 pages) to facilitate executive steering and decision-making during technical meetings.
- The contractor provides support in implementing a project evaluation with special emphasis on ensuring the effectiveness of the knowledge management process.

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Requirements for company-wide learning, knowledge and innovation:

- Contributions to conferences: knowledge exchange, events related to sustainable urban development, events of GIZ's sector networks, partners networks and similar.
- The contractor's experts are actively involved in selected DUS III networks (e.g. InREDE, Coalizão DUSA, Rede Periferia Viva, Rede Periferia Sem Risco, Rede SBN nas periferias urbanas, Rede Liderança Feminina Urbana (LFU) and others).
- The contractor provides support in implementing a project evaluation with special emphasis on ensuring the effectiveness of the knowledge management process.
- The contractor is mandatory required to participate in a virtual debriefing with the commissioning unit 2C00 and the responsible Competence Centre KC 4C30 of the GIZ Sectoral Department at the end of the contract term. During this meeting, the contractor shall present the main results achieved, technical innovations, and lessons learned to ensure integration into GIZ's corporate knowledge management. Furthermore, the contractor must submit all products developed under the contract, including datasets, methodologies, interim reports, and the final report, in a single, structured digital package to the Competence Centre. This submission is a prerequisite for the final performance confirmation and the settlement of the last invoice.
- The contractor expresses willingness, if required, to support project assistants or staff members on temporary placements who, in the context of GIZ's separately financed training programmes for junior employees, work in and undertake special tasks for the project.

Backstopping requirements:

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

- *The* contractor's responsibility for its own staff;
- *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.

2.4 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 1.11 Data protection) apply.

2.5 Other requirements

Safeguards and gender measures with specific reference to services:

To promote gender equality and avoid or mitigate possible unintended negative impacts in its area of responsibility, the contractor should implement the following measures:

- Gender equality: the contracted company must promote the reduction of gender gaps through its actions, mobilizing methodologies, pedagogical approaches, providing safe and accessible locations equipped with childcare facilities, and processes that promote equal conditions, gender-equality-oriented decision-making, and access to opportunities and the right to cities. The promotion of balanced participation in terms of gender should be a point of attention for the Contractor. Ageism and gender discrimination, such as harassment, misogynistic and LGBTQphobic behaviours, should not be tolerated in meetings, workshops, communication materials or any results and actions related to this contract.
 - Previous a gender analysis of the priority group, identifying the opportunities and challenges, including hidden deficiencies faced in specific territorial and political contexts.
 - Promote the inclusion of women, LGBTQIA+ community, and others through promotion of their visibility, participation in events and training, and support for leadership development.
 - Apply participatory approaches that foster equitable access to information, decision-making processes, and opportunities generated through the project.
- Race/ethnicity equity: the contracted company must guide actions to reduce race/ethnicity inequalities, highlighting through data and analysis inequalities in access based on ethnic and racial segregation, and guiding actions and decision-making processes aimed at reducing these. Discriminatory acts and racial/ethnic prejudice shall not be tolerated in meetings, workshops, communication materials or any results and actions related to this contract.
- People with disabilities: the contractor is required to mitigate accessibility barriers that may result in people with disabilities being unable to access the events, workshops, meetings and materials that will be developed under this contract, in order to ensure the adequate inclusion and participation of people with disabilities through physical spaces, interpreters, and accessible language systems. Ableism behaviors shall not be tolerated in meetings, workshops, communication materials or any results and actions related to this contract.
- Environmental protection and climate action (climate change mitigation/adaptation): the contracted company is requested to pay attention to mitigation and adaptation issues, expanding the project's contribution to climate change. Decision-making processes

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related to logistics, event production, technological definitions, and other decisions that result in the production of greenhouse gases (GHG) must consider choices that reduce GHG emissions and vulnerability to climate change.

- Conflict and context sensitivity: *Not applicable*
- Human rights: Seek reports from locally respected organizations on previous actions and their positive results and points of attention.
- Security precautions: if necessary, the contractor may request accompaniment from the GIZ risk management service (RMO) in Brazil.

The CONTRACTOR shall consider the conceptual advances and results achieved under previous projects in the field of integrated urban development. These include established frameworks, methodologies, tools, and lessons learned developed. S/he shall ensure consistency with these references, while further refining and adapting them to the specific socio-environmental, institutional, and territorial contexts of Amazonian cities and urban peripheries

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 in the area of responsibility 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.

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. Simple repetition of the objectives formulated in section 2 of the ToRs is not desired. Rather, the contractor is to describe and interpret the changes in the partner system that are to be directly achieved by the object of the tender procedure. The resulting positive impact on the partner system (section 1.1.1 of the assessment grid) should also be presented.

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

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

Processes describe actions or sets of tasks that are necessary in order to render specific services in a sector or in the cooperation/partner system. Specific actors are given responsibility for determining and implementing these actions and sets of tasks in line with the regulations. Actors are usually institutions such as ministries, local governments, associations and chambers, non-governmental organisations, companies in a sector or individual

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businesses, universities or banks, but may also be individuals (e.g. a person with higher decision-making authority).

Presentation of the processes in the sector and/or partner system that are relevant to the services put out tender - **Not applicable** (section 1.2.1 of the assessment grid).

Presentation of the relevant actors - **Not applicable** (section 1.2.2 of the assessment grid).

The tenderer is required to describe the interaction between the actors mentioned above. This can consist of a description of the specific collaboration between individual actors in the processes listed above, of the dependencies or conflicts between the actors and their consequences or of existing dialogue and communication formats (section 1.2.3 of the assessment grid).

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
- Development of partnerships with the relevant actors
- Approaches for leverage effects and measures for scaling-up
- Consideration of environmental and social compatibility requirements (including gender and race)
- Appropriate consideration of further requirements.

The tenderer is required to interpret the targets that it is responsible for and undertake a critical appraisal of the task. Subsequently, the tenderer must describe and justify the strategy it intends to use to achieve the milestones, targets, and results that it is responsible for by means of the work packages described in section 2. The tenderer is to avoid repeating information from the description of the implementation approach.

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 in order to achieve the milestones, objectives and results (see section 2) for which it is responsible.

The tenderer is expected to provide both a strategic approach and an implementation strategy. The technical proposal shall explain how the tenderer intends to achieve the objectives and expected results defined in Section 2, including its methodological approach, coordination and sequencing of activities, stakeholder engagement and quality assurance. The proposal should demonstrate an understanding of the territorial and institutional context of the assignment. A mere repetition or description of the tasks and activities specified in Section 2 is not sufficient.

3.3.2 Building partnerships with the relevant actors

(section 1.3.2 of the assessment grid)

- *Not applicable* -

3.3.3 Approaches for leverage effects and measures for scaling-up

(section 1.3.3 of the assessment grid)

The tenderer is required to state whether there are promising approaches for leverage effects beyond the measures mentioned in section 2 (for example through targeted measures in the field of 'knowledge management') and to describe them. In doing so, the tenderer is required to present and explain measures that promote both horizontal and vertical scaling-up. In particular, the tenderer must submit proposals on how innovations that have been developed in the context of implementation can be disseminated beyond the sphere of influence of the project.

In particular, the tenderer must submit proposals on how innovations developed in the context of implementation can be disseminated, sustained and embedded beyond the sphere of influence of the project, consider enabling conditions such as governance arrangements, institutional capacities and strategic partners.

The measures that promote both horizontal and vertical scaling-up are very important because of their relationship with the output 3.

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 in its area of responsibility and how it can contribute to improving gender equality through corresponding measures. The proposal shall also describe how the contractor will ensure a gender-balanced and diverse project team, including experts with relevant territorial experience (see also relevant requirements in section 2.5).

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 through corresponding measures (see also relevant requirements in section 2.5).

Race/ethnicity equity

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

Human rights

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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':	3 points out of 10 (maximum)
Requirement: 'Race/ethnicity equity':	3 points out of 10 (maximum)
Requirement: 'Environmental protection and climate action (climate change mitigation/adaptation)':	2 points out of 10 (maximum)
Requirement: 'Human rights':	2 points out of 10 (maximum)

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.

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 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 plan of operations.

3.4.2 Coordination with GIZ or the commissioning project

(section 1.4.2 of the assessment grid)

- *Not applicable* –

3.4.3 Steering or coordination of measures with the relevant implementing partner

(section 1.4.3 of the assessment grid)

- *Not applicable* –

3.4.4 Monitoring

(section 1.4.4 of the assessment grid)

In the tender, the tenderer is required to describe how it will regularly capture and document the status of completion of the tasks, the achievement of objectives, the results achieved and the risks in the area for which it is responsible in accordance with the specifications set out in section 2.

3.5 Further requirements

(section 1.5 of the assessment grid)

In the tender, the tenderer is required to describe the main implementation challenges to be expected in this assignment and how the tenderer will address them. The tenderer is required to provide concrete examples of tools, methodologies, or strategies to be applied to ensure the project delivery and sustainable results.

4. Personnel

The tenderer is required to provide 'experts' for the positions referred to and described (scope of tasks and qualifications) in this section based on corresponding CVs. **The requirements on the format and content of the CVs are described in section 6.**

The qualifications mentioned below correspond to the requirements for achieving the highest number of points in the technical assessment.

'One year of professional experience' is 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.

When selecting personnel, the Contractor shall seek a diverse and well-balanced team regarding gender, age, race and other relevant dimensions of diversity. To the extent possible, the staffing profile should reflect gender and racial diversity, considering the availability of qualified personnel and the specific requirements of the assignment.

Given the context of the assignment, which involves working with urban communities and territories experiencing high levels of social and economic vulnerability, a diverse and representative team is considered important for building relationships of trust, strengthening local ownership and participation, and contributing to the sustainability and long-term impact of the activities. A large part of the population in Brazilian informal settlements are people of colour (based on the classification of the Brazilian Institute of Geography and Statistics - IBGE) and the question of racial equality is an important one in the context of Brazilian public policies. The Contractor is therefore encouraged to consider diversity and representativeness in the composition of the team, while ensuring that the required qualifications and experience for the assignment are met.

Language skills must be specified in accordance with the Common European Framework of Reference for Languages (CEFR) (e.g. C1). Please note that language proficiency below the required level will receive 0 points in the evaluation.

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The Team Leader is not required to be based in Brazil and may perform the assignment remotely. All other experts shall be based in Brazil throughout the implementation period of the contract.

Specified human resources concept

The tenderer is required to provide staff for the positions ('key experts', 'experts') referred to and described here in terms of the scope of tasks and qualifications based on corresponding CVs (see section 6).

<i>Staff (assessment grid section)</i>	<i>Number of experts</i>	<i>Role</i>
Key Expert 1: Team leader (2.1)	1	<i>Responsible for leading the contract and the project team. Contributing to inclusive diagnostics, capacity building, and policy dialogue to strengthen equitable planning and decision-making (WP1, WP2)</i>
Key expert 2: Executive Secretariat Specialist (2.2)	1	<i>Responsible for providing executive secretariat and operational coordination, supporting project implementation, ensuring effective executive secretariat, agendas coordination, quality assurance, and administrative support for project delivery (WP1, WP2).</i>
Key expert 3: Long-term expert 1 – Amazonian Cities (2.3)	1	<i>Leading technical advisor for the Amazonian Cities component, ensuring the coherent implementation, technical quality and strategic alignment of demonstration projects for integrated, inclusive and climate justice-oriented urban development (WP1)</i>
Key expert 4: Long-term expert 2 – Urban peripheries (2.4)	1	<i>Leading technical advisor for the Urban Peripheries component, ensuring the coherent implementation, technical quality and strategic alignment of demonstration projects for integrated, inclusive and climate justice-oriented urban development (WP2)</i>
Expert 5: Short-term expert 1 – Policy Communication and Content Production (2.5)	1	<i>Technical support for strategic content production and translating evidence into policy-oriented communication to strengthen dissemination, public policy uptake, and scaling of project results (WP1, WP2)</i>
Expert 6: Short-term expert 2 – Data Visualization and Storytelling (2.6)	1	<i>Specialized support for transforming technical inputs, data and evidence into visual and interactive formats, supporting data storytelling, communication, and decision-making processes (WP1, WP2)</i>
Expert 7: Short-term Expert for Finance Mechanisms (2.7)	1	<i>Specialized technical support for the assessment, articulation and adaptation of financing mechanisms to improve access to urban finance for Amazonian cities. The specialist will engage with public, private, and development finance institutions, conduct technical, financial and institutional analyses. The expert will also contribute to the development of policy recommendations and technical guidance to support the implementation of integrated, inclusive, and climate justice-oriented urban development initiatives. (WP1)</i>
Expert Pool 1: Pool in integrated, inclusive urban development	10	<i>This is a pool of experts mobilized on demand to provide specialized, complementary expertise to the core project team. The pool shall comprise ten (10) experts, including five</i>

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focused on climate justice in marginalized areas in Brazil with national experience with 10 experts (2.8)		<i>(5) experts with demonstrated professional experience in Amazonian cities and five (5) experts with demonstrated professional experience in urban peripheries in Brazil. (WP1, WP2)</i>
Expert Pool 2: Pool with experts in law, urban finance and local economic development (2.9)	6	<i>Support the project to strengthen the legal and financial structuring, feasibility, and implementation of urban projects at the subnational level, while supporting the development, adaptation, and improvement of financing frameworks and instruments at the national level. (WP1, WP2)</i>

Expert 1: Team Leader with international experience (section 2.1 of the assessment grid)

This position is a key expert, responsible for leading the contract and the project team contributing to diagnostics, methodologies, capacity building and policy dialogue to strengthen more equitable and inclusive planning and decision-making.

Tasks of expert 1 – Team leader:

- **Contract Management**
 - Overall responsibility for the contractor's consulting packages (use of funds and financial planning, quality, and deadlines).
 - Ensuring the coherence and complementarity of the contractor's services with other services delivered by the project at local and national level.
 - Staff management identifying the need for short-term assignments within the available budget, planning and managing the assignments and supporting local and international experts.
 - Quality control of all deliverables and interim results.
 - Ensuring that monitoring procedures are carried out and regular reporting in accordance with deadlines.
 - Identify implementation risks (technical, institutional, political) and propose mitigation measures in coordination with the GIZ and national counterpart.
 - Contribute to adaptive management of the project, proposing adjustments to activities based on monitoring results and contextual changes, as well as continuous improvement of project strategies and approaches.
 - Ensuring the evaluation and proper documentation of best practices for the upscaling of learning and experiences,
 - Internal and external communication and representation of project activities relevant to the objectives of the contract and the project, in coordination with the GIZ Project Director (AV) and partners with political actors, the financial and economic sectors, and civil society.
- **Technical management**
 - Support the GIZ and national counterparts in updating and/or adapting the project strategy, contributing to evaluations and the preparation of a potential follow-on phase.
 - Coordinate the overall tactical and strategic alignment of the consulting team, including the Expert Pool.

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- Ensure technical and personnel management of the team, including regular reporting and compliance with established monitoring procedures.
- Contribute to the positioning of project results within international networks and thematic communities of practice upon request by GIZ and MCID.
- **Methodological Development**
 - Support the actions related to public policies, data and evidence, and municipal networks. It is related to the mechanisms for vertical and horizontal upscaling of good practices for integrated urban development* in marginalized urban areas.
 - Support selected municipal networks in knowledge transfer and in the adoption of exchange formats, with a focus on integrated urban development through the systematic use of data and evidence to inform public policy recommendations (related to WP1 and WP2).
- **Quality control, monitoring and reporting**
 - Ensure coherence and consistency across all documents and deliverables submitted to GIZ and national counterparts.
 - Oversee and ensure the overall quality of all products, inputs, sections, annexes, and outputs developed under the contract.
 - Ensure effective knowledge management, results-based monitoring, and the preparation of periodic and final project reports.
 - Design, implement, monitor, and evaluate capacity development activities for local partners in the following thematic areas: amazon cities, urban peripheries and just and inclusive transition.
- **Qualitative research and research leadership**
 - Ensure that all activities remain aligned with the principles of climate justice and maintain a consistent focus on the target groups throughout implementation.
 - Coordinate the mapping of methodologies, good practices, and technologies, and contribute to defining strategies for data analyses structuring and integration within the project scope.
 - Lead workshops and develop innovative formats for stakeholder engagement.

Qualifications of expert 1 – Team leader:

Education/training (section 2.1.1 of the assessment grid):	University degree (master's) in Urban Planning/Urban Studies, Social, Political Sciences, Economics or Geography.
Language (section 2.1.2 of the assessment grid):	Portuguese, level C1 (5 out of 10 points) English, level C2 (5 out of 10 points)
General professional experience (section 2.1.3 of the assessment grid):	10 years of professional experience in sustainable urban development acquired in the last 15 years.
Specific professional experience (section 2.1.4 of the assessment grid):	5 years of professional experience in PM&E

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Leadership/management experience (section 2.1.5 of the assessment grid):	5 years of experience in the last 15 years managing people and projects as disciplinary leadership responsibility for about 5 people minimum
International professional experience outside the country/region of assignment (section 2.1.6 of the assessment grid):	2 years of professional experience in Central America or Caribbean.
Professional experience in the country/ region of assignment (2.1.7 of the assessment grid):	3 years of professional experience in Brazil
Experience in the field of development cooperation (section 2.1.8 of the assessment grid):	3 years of experience in international urban development cooperation projects
Other (section 2.1.9 of the assessment grid):	3 years of professional experience working with the national and subnational levels

Expert 2: Junior Executive Secretariat Specialist with national experience (section 2.2 of the assessment grid)

This position is a key expert.

This key expert will coordinate the local technical implementation of the contract and support the management of the consulting team, as a right-hand person of the Team Leader. The role includes ensuring the quality and coherence of deliverables, contributing to monitoring and reporting, leading qualitative research and participatory processes, supporting capacity development and engaging with stakeholders and networks to strengthen the impact and visibility of contract results.

The professional may perform the assignment from any location. Nevertheless, regular in-person engagement with the Project Director and project team is expected. If not based in Brasília, where the project's coordination activities are primarily conducted, the professional shall travel to Brasília for coordination and alignment meetings (e.g. every two months). Costs for such domestic travel have been included in the specification of inputs of the price schedule.

Tasks of expert 2

- **Technical management**
 - Excellent organizational skills, attention to detail and document management.
 - Coordinate the operational planning and day-to-day management of project activities, ensuring alignment between the consulting team, the Expert Pool, GIZ and national counterparts.
 - Provide executive secretariat support for project implementation, including agenda management, follow-up of action points, scheduling and coordination of meetings.
 - Support the engagement with urban Networks and facilitate communication among project stakeholders.

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- Provide operational support for online and hybrid events, including management of virtual platforms, attendance records, recordings (when required) and participant support.
- Quality control, monitoring and reporting
 - Ensure systematic documentation, filing and maintenance of project records, administrative processes and repository management in accordance with GIZ standards.
 - Prepare, organize and consolidate meeting minutes, technical records, attendance lists and other project documentation.
 - Ensure consistency, completeness and quality of administrative and technical documents submitted to GIZ and national counterparts.
 - Support regular project monitoring, reporting and follow-up of deliverables, ensuring compliance with established procedures and timelines.
 - Consolidate lessons learned, recommendations and implementation records generated throughout project execution.
- Qualitative research and research leadership
 - Support the systematization of information, project documentation and knowledge products derived from workshops, consultations and collaborative processes.
 - Organize qualitative information and project records to support reporting, monitoring and knowledge management activities.
- Communication and engagement
 - Facilitate communication between the consulting team, GIZ, government counterparts, municipalities and civil society organizations.
 - Support collaborative processes with municipal networks and other relevant stakeholders.
 - Assist in preparing communication materials and supporting stakeholder engagement activities related to project implementation.

Qualifications of expert 2:

Education/training (section 2.2.1 of the assessment grid):	University degree (Bachelor's) in Executive Secretariat, Business Administration, Project Management, Public Administration or another relevant field.
Language (section 2.2.2 of the assessment grid):	Portuguese, level C2* (8 out of 10 points) English, level B1* (2 out of 10 points)
General professional experience (section 2.2.3 of the assessment grid):	3 years of relevant professional experience in executive secretariat, project management support or administrative coordination.
Specific professional experience (section 2.2.4 of the assessment grid):	Experience in providing executive secretariat and operational support to projects involving multiple stakeholders (5 out of 10 points) Experience in organizing workshops, meetings, training events, preparing reports, meeting minutes, documentation management and project monitoring (5 out of 10 points)

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Leadership/management experience (section 2.2.5 of the assessment grid):	<i>Not applicable</i>
International professional experience outside the country/region of assignment (section 2.2.6 of the assessment grid):	<i>Not applicable</i>
Professional experience in the country/ region of assignment (2.2.7 of the assessment grid):	<i>Not applicable</i>
Experience in the field of development cooperation (section 2.2.8 of the assessment grid):	<i>Not applicable</i>
Other (section 2.2.9 of the assessment grid):	Proficiency in Microsoft Office (Word, Excel, PowerPoint and Teams and related). (5 out of 10 points) Two years of professional experience with sustainable urban development. (5 out of 10 points)

Expert 3: Key expert 1 – Amazonian Cities with national experience (section 2.2 of the assessment grid)

This position is a key expert. The professional may perform the assignment from any location. Nevertheless, regular in-person engagement with the Project Director and project team is expected. If not based in Brasília, where the project's coordination activities are primarily conducted, the professional shall travel to Brasília for coordination and alignment meetings (e.g. every two months). Costs for such domestic travel have been included in the specification of inputs of the price schedule.

This Key Expert will act as the Lead Technical Advisor for the Amazonian Cities work package (WP1), working in close collaboration with a team of two GIZ Technical Advisors responsible for the component 1. The expert will ensure the coherent implementation, technical quality, and strategic alignment of the demonstration projects for integrated, inclusive, and climate justice-oriented urban development. The expert will be responsible for technical refinement and structuring to implementation, monitoring, learning, and scaling—while coordinating closely with GIZ to ensure alignment with the project's objectives, methodologies, and expected results.

The activities include technical and methodological support to improve municipal demonstration projects on integrated urban development; strengthen the institutional capacity of state-level organizations; and the systematization of evidence to provide public policy recommendations and financing mechanisms, considering the specific socio-environmental

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characteristics of the urban Amazon and local economic development. The expert is going to collaborate with the subnational and national levels.

The expert will coordinate and guide the work of short-term specialists, ensuring consistency across technical inputs (e.g., urban design, financing, governance, monitoring systems), supporting capacity development processes in pilot territories and dialogues with public sector.

Tasks of expert 3:

- **Methodological Development**
 - Lead the development, refinement and application of methodological frameworks of integrated urban development in the amazonian context, ensuring alignment with project objectives and national policy frameworks.
 - Review, structure, and design of the urban demonstration projects.
 - Support subnational organizations in providing technical assistance to cities for integrated, inclusive and climate justice-oriented urban development.
 - Systematize evidence and lessons learned to formulate public policy recommendations, as well as support the development of urban financing proposals and instruments, thereby contributing to the strengthening of integrated urban development strategies.
 - Ensure the integration of cross-cutting dimensions, including gender and climate justice, into the design and implementation of demonstration projects.
 - Guide and validate technical inputs produced by short-term experts, ensuring coherence, quality and applicability.
- **Monitoring, evaluation and reporting**
 - Provide technical oversight for the implementation of demonstration projects in pilot territories, ensuring coherence with and adherence to the agreed Action Plans.
 - Design and oversee the operationalization of monitoring, evaluation and learning systems, including indicators, baseline and endline processes, and data collection methodologies.
 - Ensure the systematic generation, analysis and interpretation of evidence from demonstration projects.
 - Ensure the operationalization and periodic updating of the integrated monitoring and learning system for the demonstration projects, including data collection, analysis, and reporting mechanisms to WP1.
 - Extract lessons learned and provided inputs at the national level through peer learning among municipalities related to WP1.
 - Contribute to the preparation of technical reports, policy briefs and deliverables, ensuring analytical robustness and relevance for decision-making.
 - Operationalizing integrated monitoring and learning systems
- **Capacity development and knowledge transfer**
 - Provide advisory support and capacity development to pilot cities, networks and partner institutions on integrated urban development approaches.
 - Facilitate cooperation mechanisms between public authorities and civil society, including participatory approaches and the promotion of women's leadership.

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- Coordinate and ensure consistency of inputs from short-term experts and other contributors involved in WP1.
- Facilitate technical exchange, knowledge transfer and validation processes among stakeholders.

Qualifications of Expert 3:

Education/training (section 2.3.1 of the assessment grid):	University degree (Master's) in Architecture and Urban Planning, Geography, Public Policy or Environment science.
Language (section 2.3.2 of the assessment grid):	Portuguese, level C2 (8 out of 10 points) English, level B2 (2 out of 10 points)
General professional experience (section 2.3.3 of the assessment grid):	5 years of professional experience in urban and environmental development, territorial planning or adaptation projects.
Specific professional experience (section 2.3.4 of the assessment grid):	5 years of experience in urban projects related to Amazonian cities in Brazil.
Leadership/management experience (section 2.3.5 of the assessment grid):	2 years of experience managing people and projects as disciplinary leadership responsibility.
International professional experience outside the country/region of assignment (section 2.3.6 of the assessment grid):	<i>Not applicable</i>
Professional experience in the country/ region of assignment (2.3.7 of the assessment grid):	4 years of experience working in Brazil with amazonian cities and socio-territorial vulnerability contexts
Experience in the field of development cooperation (section 2.3.8 of the assessment grid):	2 years of experience in development cooperation projects is an asset.
Other (section 2.3.9 of the assessment grid):	2 years of experience with Development of urban plans

Expert 4: Expert 2 – Urban Peripheries with national experience (section 2.4 of the assessment grid)

The professional may perform the assignment from any location. Nevertheless, regular in-person engagement with the Project Director and project team is expected. If not based in Brasília, where the project's coordination activities are primarily conducted, the professional shall travel to Brasília for coordination and alignment meetings (e.g. every two months). Costs for such domestic travel have been included in the specification of inputs of the price schedule.

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This Key Expert will act as the Lead Technical Advisor for the Urban Peripheries component (WP2), working in close collaboration with a team of two GIZ Technical Advisors responsible for the component 2. The expert will ensure the coherent implementation, technical quality, and strategic alignment of the demonstration projects for integrated, inclusive, and climate justice-oriented urban development. Will also be responsible for guiding the full project cycle — from technical refinement and structuring to implementation, monitoring, learning and scaling. This includes coordinating the development of integrated urban interventions, supporting the definition of institutional arrangements, and ensuring alignment with regulatory, financial and governance frameworks.

The expert will oversee establishment of participatory processes, cooperative governance mechanisms involving civil society and the systematization of evidence to provide public policy recommendations.

The expert will coordinate and guide the work of short-term specialists, ensuring consistency across technical inputs (e.g., urban design, financing, governance, monitoring systems), supporting capacity development processes in the territories and dialogues with public sector.

Tasks of expert 4:

- **Methodological Development**
 - Lead the development, refinement and application of methodological frameworks for integrated urban development in peripheral territories, ensuring alignment with project objectives and national policy frameworks.
 - Review, structure, and design of the urban demonstration projects.
 - Ensure the integration of cross-cutting dimensions, including gender, race and climate justice, into the design and implementation of demonstration projects.
 - Guide and validate technical inputs produced by short-term experts, ensuring coherence, quality and applicability.
- **Monitoring, evaluation and reporting**
 - Provide technical oversight for the implementation of demonstration projects in pilot territories, ensuring coherence with and adherence to the agreed Action Plans.
 - Design and oversee the operationalization of monitoring, evaluation and learning systems, including indicators, baseline and endline processes, and data collection methodologies.
 - Ensure the operationalization and periodic updating of the integrated monitoring and learning system for the demonstration projects, including data collection, analysis, and reporting mechanisms to WP2.
 - Extract lessons learned and provide inputs at the national level through peer learning.
 - Contribute to the preparation of technical reports, policy briefs and deliverables, ensuring analytical robustness and relevance for decision-making.
 - Operationalizing integrated monitoring and learning systems
- **Capacity development and knowledge transfer**
 - Provide advisory support and capacity development to pilot cities, networks and partner institutions on integrated urban development approaches.

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- Facilitate cooperation mechanisms between public authorities and civil society, including participatory approaches.
- Coordinate and ensure consistency of inputs from short-term experts and other contributors involved in WP2.
- Facilitate technical exchange, knowledge transfer and validation processes among stakeholders.

Qualifications of expert 4:

Education/training (section 2.4.1 of the assessment grid):	University degree (Master's) in Architecture / Urban Planning, Geography, Environmental Sciences, Peripheries
Language (section 2.4.2 of the assessment grid):	Portuguese, level C2 (8 out of 10 points) English, level B2 (2 out of 10 points)
General professional experience (section 2.4.3 of the assessment grid):	4 years of professional experience in urban and environmental development, territorial planning, informal settlements.
Specific professional experience (section 2.4.4 of the assessment grid):	4 years of experience in projects related to urban peripheries, informal settlements, nature-based solutions or inclusive development.
Leadership/management experience (section 2.3.5 of the assessment grid):	3 years of experience managing people and projects as disciplinary leadership responsibility.
International professional experience outside the country/region of assignment (section 2.4.6 of the assessment grid):	<i>Not applicable</i>
Professional experience in the country/ region of assignment (2.4.7 of the assessment grid):	3 years of experience working in Brazil with urban peripheries, informal settlements or socio-territorial vulnerability contexts
Experience in the field of development cooperation (section 2.4.8 of the assessment grid):	2 years of experience in development cooperation projects is an asset.
Other (section 2.4.9 of the assessment grid):	2 years of experience in integrating gender and/or race approaches into development projects.

Expert 5: Expert for Policy Communication and Content Production with national experience (section 2.5 of the assessment grid)

The expert will provide technical support in the production of strategic written content and the translation of technical evidence into clear, concise, and policy-oriented narratives, supporting public policy dialogue and dissemination. The expert will contribute to strengthening the uptake of project results within public policy processes, municipal networks, and scaling mechanisms for integrated urban development in marginalized urban areas.

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The short-term expert will be mobilized on demand to provide specialized, complementary expertise to the core project team.

Tasks of expert 5:

- Produce policy briefs, executive summaries, and technical reports translating project results into clear and policy-oriented narratives.
- Synthesize complex technical evidence and data into accessible content for decision-makers, municipal networks, federal governments and other publics.
- Support the development of evidence-based communication strategies aligned with policy priorities and project objectives.
- Support to the systematization of lessons learned and good practices, ensuring clarity and coherence of messaging.
- Contribute to the design and implementation of communication strategies grounded in evidence, ensuring alignment with policy priorities and facilitating the uptake of recommendations by decision-makers.
- Provide communication support to multi-stakeholder working groups, including preparation of materials, synthesis of discussions, and facilitation inputs to enhance clarity and engagement.
- Contribute to the communication of good practices and lessons learned, enabling their replication and scaling across municipal networks through clear and impactful formats.

Qualifications of expert 5:

Education/training (section 2.5.1 of the assessment grid):	University degree (Bachelor's) in Communication, Public Policy, Social or Political Science.
Language (section 2.5.2 of the assessment grid):	Portuguese, level C2 (8 out of 10 points) English, level B2 (2 out of 10 points)
General professional experience (section 2.5.3 of the assessment grid):	4 years of professional experience in policy communication and strategic communication, development of policy briefs, reports, and technical materials;
Specific professional experience (section 2.5.4 of the assessment grid):	4 years of experience in communication process of decision-making, translating complex technical content into accessible formats, supporting evidence-based policy processes;
Leadership/management experience (section 2.5.5 of the assessment grid):	<i>Not applicable</i>
International professional experience outside the country/region of assignment (section 2.5.6 of the assessment grid):	<i>Not applicable</i>
Professional experience in the country/ region of assignment (2.5.7 of the assessment grid):	3 years of experience working in Brazil with government institutions, municipal networks, or international cooperation projects (5 of 10 points);

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	2 years of experience working in Brazil with topics related to urban development, climate, or social inclusion (5 of 10 points).
Experience in the field of development cooperation (section 2.5.8 of the assessment grid):	<i>Not applicable</i>
Other (section 2.5.9 of the assessment grid):	<i>Not applicable</i>

Expert 6: Expert for Visual, Data and Storytelling Specialist with national experience
(section 2.6 of the assessment grid)

This expert will provide specialized support for transforming technical inputs, data and evidence into visual and interactive formats, supporting data storytelling, communication, and decision-making processes. The specialist is responsible for the visual design and layout of publications, development of infographics, data visualization products and communication materials, ensuring consistency with project branding and visual identity guidelines.

The short-term expert will be mobilized on demand to provide specialized, complementary expertise to the core project team.

Tasks of expert 6:

- Design and produce policy briefs, infographics, presentations, and visual materials that translate complex technical content into clear, accessible, and policy-relevant messages.
- Transform data, monitoring results, and evidence into compelling narratives using data storytelling approaches, including the development of interactive dashboards and visual tools to support decision-making.
- Support to evidence-based communication strategies.
- Contribute to the design and implementation of communication strategies grounded in evidence, ensuring alignment with policy priorities and facilitating the uptake of recommendations by decision-makers.
- Provide communication support to multi-stakeholder working groups, including preparation of materials, synthesis of discussions, and facilitation inputs to enhance clarity and engagement.
- Contribute to the communication of good practices and lessons learned, enabling their replication and scaling across municipal networks through clear and impactful formats.

Qualifications of expert 6:

Education/training (section 2.6.1 of the assessment grid):	University degree (Bachelor's) in Design, Visual and Data Visualization, Communication or Data Science.
Language (section 2.6.2 of the assessment grid):	Portuguese, level C2 (8 out of 10 points) English, level B2 (2 out of 10 points)

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General professional experience (section 2.6.3 of the assessment grid):	5 years of data storytelling and data visualization, information design, development of interactive dashboards and infographics;
Specific professional experience (section 2.6.4 of the assessment grid):	<i>Not applicable</i>
Leadership/management experience (section 2.6.5 of the assessment grid):	<i>Not applicable</i>
International professional experience outside the country/region of assignment (section 2.6.6 of the assessment grid):	<i>Not applicable</i>
Professional experience in the country/ region of assignment (2.6.7 of the assessment grid):	2 years of experience working in Brazil with government institutions, municipal networks, or international cooperation projects (5 of 10 points); 2 years of experience working in Brazil with topics related to urban development, climate and social inclusion (5 of 10 points).
Experience in the field of development cooperation (section 2.6.8 of the assessment grid):	<i>Not applicable</i>
Other (section 2.6.9 of the assessment grid):	2 years of experience in transform data into visual products (6 of 10 points) 2 years of experience in UX/UI for dashboards and interactive tools (2 of 10 points) 2 years of experience in working with multidisciplinary teams (2 of 10 points)

Expert 7: Expert for Finance Mechanisms with national experience (section 2.7 of the assessment grid)

This expert will provide specialized technical support for the assessment, articulation and adaptation of financing mechanisms to improve access to urban finance for Amazonian cities. The specialist will engage with public, private, and development finance institutions, conduct technical, financial and institutional analyses. The expert will also contribute to the development of policy recommendations and technical guidance to support the implementation of integrated, inclusive, and climate justice-oriented urban development initiatives.

The short-term expert will be mobilized on demand.

Tasks of Expert 7:

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- Facilitate technical dialogue and stakeholder engagement with public, private, and development finance institutions to support the validation and implementation of financing solutions.
- Provide technical support for the assessment and adaptation of financing mechanisms for integrated urban development in Amazonian cities.

Qualifications of expert 7:

Education/training (section 2.7.1 of the assessment grid):	University degree (Master's) in Economics, Finance, Public Administration or Public Policies.
Language (section 2.7.2 of the assessment grid):	Portuguese, level C2 (8 out of 10 points) English, level B2 (2 out of 10 points)
General professional experience (section 2.7.3 of the assessment grid):	5 years of experience in urban finance, infrastructure finance, climate finance or public investment.
Specific professional experience (section 2.7.4 of the assessment grid):	3 years with public financial institutions, development banks, multilateral organizations or investment funds.
Leadership/management experience (section 2.7.5 of the assessment grid):	<i>Not applicable</i>
International professional experience outside the country/region of assignment (section 2.7.6 of the assessment grid):	<i>Not applicable</i>
Professional experience in the country/ region of assignment (2.7.7 of the assessment grid):	3 years of experience working in Brazil with government institutions and financial institutions;
Experience in the field of development cooperation (section 2.7.8 of the assessment grid):	<i>Not applicable</i>
Other (section 2.7.9 of the assessment grid):	2 (two) reference projects in urban development policies and financing in Brazil (5 of 10 points); 1 (one) reference project in the Amazon region working in Brazil with topics related to urban development (5 of 10 points).

Expert 8: Pool 1 - in integrated, inclusive urban development focused on climate justice in marginalized areas in Brazil with 10 experts with national experience (section 2.8 of the assessment grid)

The pool aims to provide specialized expertise to strengthen integrated, inclusive, and climate justice-oriented urban development in marginalized urban areas in Brazil.

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In derogation from the number of experts mentioned above, **5** CVs must be added to the tender. The ability of the tenderer to offer the pool of experts required here is assessed solely on the basis of these exemplary CVs.

This is a pool of experts mobilized on demand to provide specialized, complementary expertise to the core project team. The pool shall comprise **ten (10) experts**, including **five (5) experts with demonstrated professional experience in Amazonian cities** and **five (5) experts with demonstrated professional experience in urban peripheries in Brazil**.

The experts in this pool will be mobilized under the technical coordination and guidance of Experts 3 and 4, who will define the scope of work, ensure the quality and consistency of the technical results, and coordinate the integration of the experts' contributions into the respective work packages in alignment with the GIZ project team. The experts may be mobilized according to project needs and timelines as the activities under Work Package 1 and Work Package 2 may be implemented in parallel.

Tasks of the expert pool in line with the work packages above:

- Provide technical support to review, structure, and design three (3) urban demonstration projects in Amazon cities (related to WP1).
- Provide technical support for the design and operationalization of decentralized technical assistance to cities in the planning and implementation of integrated urban development through state-level organizations in Amazon region (related to WP1).
- Provide technical support to review, structure, and design three (3) urban demonstration projects in urban peripheries (related to WP2).
- Provide technical advisory services for the improvement of public policies through recommendations based on evidence related to integrated urban development (related to WP1, WP2).
- Provide technical and strategic support to test and scale practical tools and evidence-based approaches for integrated, inclusive, and climate justice-oriented urban development in marginalized urban areas (related to WP1, WP2).

Qualifications of the Expert pool

Education/training (section 2.8.1 of the assessment grid):	All experts with a university degree (master's) in either or a combination of the following fields: <ul style="list-style-type: none"> • Architect and/or Urban Planner • Environmental Engineer, Civil Engineering, Hydrologist • Geography, Environmental Sciences, Political Science • Social Sciences, Anthropology, Political Science
Language (section 2.8.2 of the assessment grid):	All experts: Portuguese, level C2
General professional experience (section 2.8.3 of the assessment grid):	<i>Not applicable</i>

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Specific professional experience (section 2.8.4 of the assessment grid):	<ul style="list-style-type: none"> • 1 expert with 5 years of professional experience in development of urban project concepts, master plans or strategic action plans. (2 of 10 points) • 1 expert with 5 years of professional experience in climate Adaptation, nature-based solution, informal settlement re-urbanisation or urban resilience. (2 of 10 points) • 1 expert with 5 years of professional experience in urban governance. (2 of 10 points) • 1 expert with 5 years of professional experience in urban and territorial Data Analys and Monitoring Systems. (2 of 10 points) • 1 expert with 5 years of professional experience in participatory processes, stakeholder engagement, or capacity development. (2 of 10 points) <p>All experts shall have specific experience in one of the fields above; all experts should have 5 years of specific professional experience (not part of the evaluation).</p>
Leadership/management experience (section 2.8.5 of the assessment grid):	<i>Not applicable</i>
International professional experience outside the country/region of assignment (section 2.8.6 of the assessment grid):	<i>Not applicable</i>
Professional experience in the country/ region of assignment (2.8.7 of the assessment grid):	<p>Three (3) experts with five (5) years of professional experience in Amazonian cities. (6 out of 10 points)</p> <p>Two (2) experts with five (5) years of professional experience in urban peripheries in Brazil.(4 out of 10 points)</p>
Experience in the field of development cooperation (section 2.8.8 of the assessment grid):	<i>Not applicable</i>
Other (section 2.8.9 of the assessment grid):	<i>Not applicable</i>

Expert 9: Pool 2 in law, urban finance and local economic development with 6 experts with national experience (section 2.10 of the assessment grid)

This is a pool of short-term experts mobilized on demand to provide specialized, complementary expertise to the core project team. The capacity of the tenderer to provide this pool will be assessed based on exemplary CVs.

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In derogation from the number of experts mentioned above, **4** CVs must be added to the tender. The ability of the tenderer to offer the pool of experts required here is assessed solely based on these exemplary CVs.

The pool aims to support the project to strengthen the financial structuring, feasibility, and implementation of urban projects, while supporting the development, adaptation, and improvement of financing frameworks and instruments at the national level.

The experts in this pool will be mobilized under the technical coordination and guidance of Experts 3 and 4, who will define the scope of work, ensure the quality and consistency of the technical results, and coordinate the integration of the experts' contributions into the respective work packages in alignment with the GIZ project team. The experts may be mobilized according to project needs and timelines as the activities under Work Package 1 and Work Package 2 may be implemented in parallel.

Tasks of the expert pool

- Assess financial and economic viability of up to 6 projects, including risk analysis, sustainability, and recommendations to strengthen project bankability (related to the WP1 & WP2)
- Support the structuring of financing plans, bankable business models, and financial models (CAPEX/OPEX, cash flow), including resource mobilization strategies (related to the WP1 & WP2).
- Facilitate engagement with the private sector, including PPPs and blended finance, and provide support on procurement, contracting, risk management, and land-based financing instruments (related to the WP1 & WP2).
- Build capacity and integrate climate risk into financial planning (related to the WP1 & WP2).
- Define financial monitoring indicators, while promoting local economic development approaches (related to the WP1, WP2).
- At the National level, map financing instruments, systematize evidence, and develop data-driven policy recommendations and innovative financing mechanisms (e.g., PPPs, climate finance, blended finance), to improve access to finance and align national programs with the needs of Amazonian cities and marginalized areas (related to the WP1, WP2).
- Provide legal and regulatory advice related to the implementation of demonstration projects involving civil society organizations (CSOs) (related to the WP2).
- Support the definition of institutional arrangements required for the long-term operation, maintenance and sustainability of demonstration projects (related to the WP1 & WP2).
- Provide legal guidance to support the institutional strengthening and formalization of local organizations (related to the WP1 & WP2).

Qualifications of the Expert pool

Education/training (section 2.9.1 of the assessment grid):	All experts with a university degree (master's) in either or a combination of the following fields: <ul style="list-style-type: none">• Economics and Business Administration
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	<ul style="list-style-type: none"> • Finance • Public Policy • Law
Language (section 2.9.2 of the assessment grid):	All experts: Portuguese, level C2
General professional experience (section 2.9.3 of the assessment grid):	<i>Not applicable</i>
Specific professional experience (section 2.9.4 of the assessment grid):	<p>All experts should have 5 years of specific professional experience:</p> <ul style="list-style-type: none"> • 1 expert with professional experience in project financing, financial feasibility analysis, and investment appraisal. (3/10 points) • 1 expert with professional experience in urban finance: financing mechanisms, financial feasibility, governance arrangements, and investment appraisal for infrastructure and sustainable urban development projects. (2/10 points) • 1 expert with professional experience in economic analysis and territorial development (3/10 points) • 1 expert with professional experience in Professional experience in legal practice, consulting and advisory (2/10 points)
Leadership/management experience (section 2.9.5 of the assessment grid):	<i>Not applicable</i>
International professional experience outside the country/region of assignment (section 2.9.6 of the assessment grid):	<i>Not applicable</i>
Professional experience in the country/ region of assignment (2.9.7 of the assessment grid):	All experts with 3 years of professional experience in Brazil.
Experience in the field of development cooperation (section 2.9.8 of the assessment grid):	<i>Not applicable</i>
Other (section 2.9.9 of the assessment grid):	<i>Not applicable</i>

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

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Europe, Southern Europe, Western Europe, Australia, Melanesia, Micronesia and Polynesia; refer to [USND methodology](#) for country assignment.

The tenderer must assign all the proposed 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.

Soft skills of team members

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

- Team skills
- Initiative
- Communication skills
- Sociocultural and intercultural skills
- Efficient partner- and client-oriented working methods
- Interdisciplinary thinking

Soft skills are not evaluated.

Staff presentation (section 2.11 of the assessment grid)

– Not applicable –

5. Costing requirements

In your tender, please do not deviate from the specification of inputs 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 contractor will be remunerated. We would also like to point out that it may not be necessary to make use of the total number of proposed expert days.

5.1 Assignment of experts

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	Number of international flights	Number of national flights
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				Conditions, section 3.6.2)		
Expert 1: Team Leader	85	85	170	no	6	6
Expert 2: Executive Secretariat Specialist	0	244	244	no	0	0
Expert 3: Long-term Expert Amazon Cities	0	306	306	no	1	40
Expert 4: Long-term Expert Urban Peripheries	0	306	306	no	1	40
Expert 5: Short-term Expert in Policy Communication and Content Production	0	60	60	no	0	0
Expert 6: Short-term Expert in Data Visualization and Storytelling	0	60	60	no	0	0
Expert 7: Short-term Expert for Finance Mechanisms	0	100	100	no		6
Expert 8: Pool of Experts in integrated, inclusive urban development focused on climate justice in marginalized urban areas	0	700	700	no	0	33
Expert 10: Pool of Experts in urban finance and local economic development (LED)	0	100	100	no	0	6

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Total	85	1961	2046	-no	8	131
Backstopping	<i>Not applicable</i>	<i>Not applicable</i>	<i>Not applicable</i>	<i>Not applicable</i>	<i>Not applicable</i>	<i>Not applicable</i>

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 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](#) has published a [list of standards](#) (only in German available). GIZ recommends using the standards specified there.

5.3.2 Travel expense requirements

The travel expenses must be costed as follows by the contractor:

Travel expenses item	Quantity/budget
Total number of international flights (Quantity 1 is the number of return (i.e. outbound/inbound) flights.)	8 flights (round trip) flights (against evidence)
Total number of regional/national flights (Quantity 1 is the number of return (i.e. outbound/inbound) flights.)	131 (round trip) flights (against evidence)
CO ₂ offsets for flights	EUR 6.950,00 total

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	An unalterable budget for CO ₂ offsets for settlement against evidence is specified.
Transfer costs	EUR 2.500,00 (fixed budget, remuneration against evidence)
Per-diem allowances for all experts	870 per diem
Accommodation allowances for all experts	870 allowances
Other travel expenses (visa, project-related travel expenses outside the place of business etc.)	EUR 5.400,00 (fixed budget, remuneration against evidence)

Tenders may include per-diem allowances up to the maximum amounts permissible (**51 EUR for Brasília**) 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 (download at <https://www.bundesfinanzministerium.de>). They will be reimbursed as a **lump sum** at the contractually agreed level.

Accommodation allowances outside Germany will be reimbursed in accordance with the following provision

For the city of Brasília in the country Brazil, tenderers may offer accommodation allowances up to EUR 88,00. This is the maximum amount permissible under tax law as per the BMF circular on travel expense reimbursement.

- If the contractor offers accommodation allowances at up to 75% (EUR 66,00) of the maximum amounts permissible under tax law as per the BMF circular on travel expense reimbursement, the expenses will be reimbursed **on a lump-sum basis** in the contractually agreed amount.
- If the contractor offers accommodation allowances at between 75% and 100% (EUR 66,01 - 88,00) of the maximum amounts permissible under tax law as per the BMF circular on travel expense reimbursement, the corresponding **evidenced expenses** will be reimbursed up to the contractually agreed amount.

In addition, for the following items, reasonable costs can be settled against evidence up to the proposed amount.

- Flight costs
- Transport costs
- Other travel expenses

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

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5.4 Materials and equipment

Budget for materials and equipment: EUR 15.000,00

The fixed, unalterable budget above is earmarked for the procurement of the materials and equipment described in the table below (payment against evidence).

Made available free of charge by the project executing agency (local project partner) for the duration of the contract.	Made available free of charge by GIZ for the duration of the contract.	Materials and equipment to be procured by the contractor in the financial bid.
-	-	IT equipment (e.g. webcams, microphones, audio recorders and other low-cost devices to support meetings and workshops).
-	-	Publications (e.g. printing of communication materials, facilitation kits and participatory workshop materials such as posters, cards and visual aids).

5.5 Operating costs in the country of assignment

State Office space, in Brasilia, will be provided by the project.

5.6 Workshops, education and training

– Not applicable –

5.7 Local contributions

– Not applicable –

5.8 Other costs

– Not applicable –

5.9 Flexible remuneration item

Budget for flexible remuneration: EUR 30.000,00

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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 3.6.5.7 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 15 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. External content (e.g. links to websites) will also be disregarded.

The CVs of the staff proposed in accordance with section 4 of the ToRs must be in the EU format and not more than four pages in length. The CVs can also be submitted in English and/or Portuguese.

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).
- 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, we request that you number the references sequentially and provide only references that are clearly related to the object of this tender.

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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:

Despite researching all the available sources of local and technical information, the scope of the possible increase in the contract value/extension of the contract term cannot be objectively determined at the point when the tender is issued (maximum value is the original contract value).

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.

The services rendered by the contractor have been positively evaluated, and there is a documented technical requirement to expand the advisory support to the partner cities or to deepen the data-driven urban mobility measures within the scope of the project objectives.

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 Option to procure materials and equipment pursuant to section 132 (2) no. 1 German Act against Restraints of Competition (GWB)

- Not applicable-

7.3 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:

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.

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A follow-on contract under 7.3 can be considered only as an alternative to the option in 7.1.

8. Annexes

- Map of actors
- Module Impact Matrix (project)
- Impact Logic (Logframe) for a module
- Module Offer (Project)
- Important Definitions