

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

Project title:

Sustainable Economic Transformation and Sustainable Finance

Country:

Global

Subject of the tender procedure:

Consultancy support services for the development and implementation of sustainable finance taxonomies

Processing

number/cost centre:

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10045510

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0. List of abbreviations

BMZ	German Federal Ministry for International Cooperation and Development
CB	Capacity Building
EC	European Commission
EU	European Union
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
GBF	Global Biodiversity Framework
GTC	General Terms and Conditions of Contract for supplying services and work on behalf of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
KOMP	Cost per output monitoring and forecast
LoI	Letter of intent
MoU	Memorandum of Understanding
NDC	Nationally Determined Contributions
ODA	Official Development Assistance
RMO	Risk Management Office
SDGs	Sustainable Development Goals
SFAH	Sustainable Finance Advisory Hub

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TEG	Technical Expert Group
TSC	Taxonomy Steering Committee
ToRs	Terms of reference
WP	Work Package

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1. Context

In recent years, there has been a notable momentum to systematically integrate sustainability into financial decision making. Sustainable finance not only increases the resilience of financial systems by enhancing the management of sustainability risks, but also contributes to closing the funding gap to implement the Sustainable Development Goals and the Paris Climate Agreement. However, channeling capital into sustainability-aligned investments requires a clear definition and common understanding of what qualifies as “sustainable“, which establishes a level playing field, builds trust and helps prevent greenwashing. Given the proliferation of such definitions around the world, sustainable finance taxonomies are emerging as a powerful policy instrument to provide the much-needed guidance for the market.

Sustainable finance taxonomies provide a clear definition and classification of sustainable economic activities. They help assess whether or to what extent an economic activity contributes to a sustainability goal, and thereby foster market transparency and integrity. They facilitate scaling up sustainable finance and have the potential to play a significant role in aligning investment trajectories with global development goals.

Many countries and regions have developed or are in the process of developing taxonomies, including Bangladesh, China, Colombia, the EU, Indonesia, Mongolia, Peru, Rwanda, Sri Lanka, South Africa, and Vietnam. Other countries seek to follow suit, leading to a large and growing demand among emerging and developing countries for guidance and hands-on support in developing and implementing taxonomies that suit the regional or country context. While policy makers in partner countries can borrow and benefit from international good practices and already published taxonomies, varying development levels, local interests, different environmental and social objectives, a lack of available data and implementation capacities require a nuanced approach to taxonomy development and implementation.

The *Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH* is actively supporting partner countries develop and implement sustainable finance taxonomies. On behalf of the German Government and co-funded by the EU under the Sustainable Finance Advisory Hub and the Global Gateway Initiative, GIZ supports partner countries along a spectrum of activities at various stages of the taxonomy development process.

As part of this assignment, GIZ seeks to expand its technical advisory services supporting the development, implementation and continuous evolution of sustainable finance taxonomies in partner countries. In response to growing demand from partner institutions, the support provided under this contract will be tailored to the specific needs, priorities and level of maturity of individual taxonomy initiatives, while promoting alignment with international good practices and interoperability with relevant global and regional frameworks.

The objective of GIZ's global project Sustainable Economic Transformation and Sustainable Finance (hereinafter "the Global Project") is to advance the transformation towards a more sustainable economy and financial sector, grounded in international standards and global agendas. To this end, the project implements activities in three main areas of intervention:

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- **Pillar 1:** Fostering global knowledge exchange and peer-learning regarding the sustainable transformation of the economy and the financial sector.
- **Pillar 2:** Supporting development of policy and regulatory frameworks in partner countries governing the transformation toward a sustainable economy and financial sector in partner countries.
- **Pillar 3:** Providing advisory services and technical assistance to embed sustainability in governance and financial decision-making of financial institutions.

Against this backdrop, the Global Project seeks to recruit a qualified contractor to provide technical advisory services and stakeholder engagement support for sustainable finance taxonomy initiatives in partner countries designated by GIZ during the contract period. The services may cover the full lifecycle of taxonomy initiatives, including methodology development, drafting and revision of taxonomy criteria, interoperability analyses, stakeholder consultation processes, implementation support, and related technical assistance activities required to advance sustainable finance taxonomies that address national sustainability priorities while maintaining interoperability with internationally recognised approaches.

The global project is commissioned by the German Federal Ministry for International Cooperation and Development (BMZ) and co-financed by the European Commission (EC). The global project's overall objective is to advance the transformation towards a more sustainable economy and financial sector, grounded in international standards and global agendas. Among other activities, the project supports the development of sustainable finance policy and regulatory frameworks in partner countries, including the development of sustainable taxonomies, and disclosure requirements.

The global project is part of the Team Europe Initiative Sustainable Finance Advisory Hub (SFAH or the Hub), a multi-donor EU Action implemented by a consortium of European and international partners including GIZ and falls under the Global Gateway initiative. The overall objective of the SFAH is to build a conducive environment for sustainable finance and promote the uptake of sustainability-related instruments with a view to contribute to mobilize financing for the priorities of Global Gateway, in support of the SDGs. The SFAH is a demand-based technical assistance facility that offers support to developing countries and emerging economies in the following areas: 1) Credible sustainable finance frameworks; 2) support to green bond issuances; 3) support to other sustainability-related financial products. The SFAH Secretariat will support the coordination of the activities of the Hub's implementing partners, ensure monitoring and reporting as well as quality assurance and knowledge management activities. One of the functions of the SFAH Secretariat is to prepare the working materials of the Hub, i.e. processes, guidelines, and templates for specific types of assignments.

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.

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2.2 Objectives, work packages, and milestones

The contractor will contribute to the objectives of the Global Project Sustainable Economic Transformation and Sustainable Finance and the Sustainable Finance Advisory Hub (SFAH) by providing specialised technical advisory services to support sustainable finance taxonomy initiatives in partner countries designated by GIZ during the contract period.

The overall objective of the assignment is to provide flexible, high-quality technical support throughout the lifecycle of sustainable finance taxonomy initiatives. Depending on the needs of individual partner countries, the services may include the design, development, implementation, revision and enhancement of sustainable finance taxonomies and related technical tools, while promoting interoperability with internationally recognised frameworks and reflecting national priorities and institutional contexts.

The contractor is responsible for contributing to the objectives and indicators described in this document.

Module objective: Advancing the sustainable economic transformation taking into account international standards and global agendas.

Output 2: develop new legal frameworks or regulatory instruments in the financial sector aligned closely with international standards on sustainable finance by supported public institutions.

Indicators:

- 2.1. new policy documents or templates for the introduction of relevant legal frameworks or regulatory instruments have been developed by supported public institutions.
- 2.2. participants in training courses for public institutions have significantly increased their competencies in sustainable finance.

Output 3: financial sector actors supported have implemented sustainability aspects in their business practices.

Indicators:

- 3.2. participants in training courses for financial sector actors have significantly increased their professional competences in sustainable finance.

The services to be provided under this contract are organised into thematic work packages. These work packages define the categories of services that may be requested by GIZ during contract implementation. The implementation of the services to be rendered will include a combination of the work packages, depending on the objectives and requirements of the respective partner country. The contractor is responsible for providing the following work packages and for achieving the corresponding milestones. The mentioned percentage of experts days per work package are indicative and can be adapted during implementation:

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Work Package 1 – Cross-cutting methodologies, templates and guidance (around 3% of expert days)

This work package covers the development and continuous improvement of cross-cutting methodological approaches, guidance documents, templates, technical tools and knowledge products that can be applied across multiple partner countries. The outputs developed under this work package are intended to promote consistency, efficiency and interoperability in the design, implementation and revision of sustainable finance taxonomies, while reflecting evolving international good practices and standards.

The contractor shall provide the following services, or a subset thereof, based on requests from GIZ during contract implementation.

Activities

- a) *Develop methodological guidance* – Develop practical guidance documents to support the design, development, implementation and revision of sustainable finance taxonomies.
- b) *Develop templates* – Prepare standardised templates and tools that facilitate consistent and efficient taxonomy development and implementation across partner countries.
- c) *Produce technical knowledge products* – Prepare technical notes, analytical reports, policy briefs and other knowledge products on sustainable finance taxonomies, including thematic analyses, lessons learned, emerging trends, uptake, implementation experiences and recommendations for partner countries and GIZ.
- d) *Prepare comparative and interoperability analyses* – Conduct comparative assessments of sustainable finance taxonomies, methodologies and related frameworks, including analyses of interoperability, implementation approaches, governance arrangements and international developments, to inform technical assistance and knowledge sharing.
- e) *Develop tools supporting interoperability* – Develop technical tools, mapping methodologies and other resources that facilitate interoperability between national taxonomies and internationally recognised frameworks.
- f) *Update guidance based on international developments* – Regularly review and revise guidance documents and tools to reflect new international standards, scientific developments and good practices in sustainable finance taxonomies.

Table 1: Milestones for work package 1

Milestones for work package 1	Delivery period
Kick-off meeting	1 week after the start of the activity
Draft documents have been submitted to GIZ for review	1-2 months after start of the activity
Final documents have been submitted to GIZ	2-4 months after start of the activity

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Work package 2: Support Development of Sustainable Finance Taxonomies (around 80% of expert days)

In this work package (WP), the contractor shall support partner institutions in the development of sustainable finance taxonomies from inception to finalisation. The country of assignment and specific support requirements will be defined during contract implementation.

Sustainable finance taxonomy initiatives supported under this contract may pursue different policy objectives depending on the priorities of the respective partner country. These may include, but are not limited to, climate change mitigation, climate change adaptation, biodiversity and ecosystem conservation, circular economy and other environmental or sustainability objectives consistent with international good practice. The contractor shall provide the technical expertise required to support the respective objectives identified by GIZ and partner institutions.

Depending on the needs of partner institutions, support may cover the full taxonomy development process or selected components thereof. Services may need to be delivered fully or partly in the official language(s) of the partner country (English, French, Spanish or Portuguese).

We expect to support around 3 countries under this work package. The exact number will depend on the specific requirements of partner institutions. For each country, the contractor shall provide the following services, or a subset thereof, based on the support needs identified by GIZ and partner institutions.

Activities

- a) *General support and project coordination* - The contractor shall support the overall organisation and strategic direction of the taxonomy development process. Activities may include:
 - Develop a detailed workplan for the taxonomy development process.
 - Conduct an inception phase and scoping assessment.
 - Identify relevant stakeholders and institutions.
 - Provide continuous strategic and technical advice.
 - Support coordination between technical working groups and relevant authorities.
 - Conduct country missions and virtual consultations where required.
- b) *Governance support and stakeholder engagement* - The contractor shall support partner institutions in establishing effective governance arrangements and stakeholder engagement processes. Activities may include:
 - Review relevant national policies, strategies and commitments.
 - Support the establishment or strengthening of governance structures for the taxonomy development.
 - Advise on roles and responsibilities of participating institutions.
 - Prepare stakeholder engagement strategies.
 - Facilitate consultations with public and private sector stakeholders.
- c) *Capacity building and knowledge transfer* - The contractor shall strengthen the capacity of institutions involved in taxonomy development. Activities may include:
 - Deliver introductory training on sustainable finance taxonomies.

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- Deliver advanced technical training on taxonomy methodologies and international approaches.
 - Train technical expert groups and steering committees.
 - Organise stakeholder workshops to validate technical proposals.
 - Support peer learning between jurisdictions.
 - Develop training materials and guidance documents.
- d) *Technical taxonomy development* - The contractor shall provide technical expertise for the design and drafting of taxonomy components. Activities may include:
- Assess national policies, sector strategies and sustainability commitments.
 - Develop recommendations on taxonomy objectives, principles and structure.
 - Support sector selection and prioritisation.
 - Conduct sectoral studies.
 - Identify economic activities and eligibility criteria.
 - Develop technical screening criteria.
 - Support alignment with international classification systems.
 - Assess interoperability with international frameworks
 - Produce reports related to the activities mentioned above.
- e) *Consultation, finalisation and dissemination* - The contractor shall support the validation and finalisation of taxonomy documents. Activities may include:
- Develop consultation materials.
 - Facilitate stakeholder consultation processes.
 - Analyse and incorporate stakeholder feedback.
 - Finalise taxonomy documentation.
 - Provide technical inputs to support dissemination and communication activities.

Advisory services will be provided remotely through virtual means as well as through in-country missions. The focus is on developing countries and the applicable country will be communicated ahead of the kick-off meeting, after GIZ has received a request for support from the partner country or the funders.

Typical milestones to be achieved during the contract term are laid out below.

Table 2: Milestones for each country in work package 2

Milestones for work package 2	Delivery period
Kick-off meeting	1 week after the start of the WP
Detailed workplan and stakeholder mapping completed	3 weeks after start of the country activities
Capacity building activities completed	2 - 3 months after start of country activities
White paper has been written	2 - 4 months after start of the country activities
Sector studies have been conducted, technical criteria developed	3 - 5 months after start of country activities
Stakeholder consultation completed	4 - 6 months after start of country activities
Taxonomy and final taxonomy paper have been finalised and disseminated	6 - 9 months after start of the country activities
Implementation guidelines have been published	6 - 9 months after start of the country activities

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**Work Package 3: Support the Implementation of Sustainable Finance Taxonomies
(around 17% of expert days)**

In this work package (WP), the contractor shall support partner institutions in operationalising sustainable finance taxonomies and integrating them into sustainable finance frameworks, regulatory and supervisory processes, public policies and market practices. The country of assignment and specific implementation support required will be defined during contract implementation.

Depending on the needs of partner institutions, implementation support may be provided for newly developed or existing taxonomies and may relate to one or more environmental or sustainability objectives. Services may need to be delivered fully or partly in the official language(s) of the partner country (English, French, Spanish or Portuguese).

We expect to support around 2 countries under this work package. The exact number will depend on the specific requirements of partner institutions. For each country, based on the support needs identified by GIZ and partner institutions, the contractor shall be responsible for providing a subset of the following services:

- a) *Implementation planning and strategic advice* - The contractor shall support partner institutions in planning and coordinating the implementation of sustainable finance taxonomies. Activities may include:
 - Assess implementation readiness and identify institutional, regulatory and technical gaps.
 - Develop implementation roadmaps and action plans.
 - Define institutional roles and responsibilities.
 - Advise on governance arrangements for implementation.
 - Provide strategic advice throughout the implementation process.
- b) *Regulatory and policy integration* - The contractor shall support the integration of sustainable finance taxonomies into relevant policy, regulatory and supervisory frameworks. Activities may include:
 - Review relevant legislation, regulations and policy frameworks.
 - Identify opportunities to embed the taxonomy into sustainable finance policies and regulatory instruments.
 - Develop recommendations for legislative and regulatory amendments where appropriate.
 - Support integration into supervisory frameworks and financial sector guidance.
- c) *Integration with sustainable finance instruments* - The contractor shall support the application of sustainable finance taxonomies across financial markets and public sector initiatives. Activities may include:
 - Assess linkages with sustainable finance instruments and initiatives.
 - Support integration into disclosure frameworks.

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- Support alignment with sustainable financial products and investment frameworks.
 - Support integration into public finance initiatives, including green budgeting and public investment frameworks.
- d) *Operational guidance and capacity building* - The contractor shall support partner institutions and market participants (e.g. financial institutions) in applying sustainable finance taxonomies in practice. Activities may include:
- Develop implementation manuals and user guides.
 - Prepare technical guidance documents.
 - Deliver training programmes and workshops.
- e) *Monitoring, evaluation and continuous improvement* - The contractor shall support partner institutions in monitoring taxonomy implementation and identifying opportunities for continuous improvement. Activities may include:
- Develop monitoring and evaluation frameworks.
 - Define implementation indicators.
 - Assess implementation progress and challenges.
 - Prepare recommendations for taxonomy updates and continuous improvement.
- f) *Communication and awareness raising* - The contractor shall support communication activities promoting the effective implementation of sustainable finance taxonomies. Activities may include:
- Provide technical inputs for the development of communication materials.
 - Prepare frequently asked questions (FAQs) and explanatory documents.
 - Support webinars, conferences and stakeholder events.
 - Develop awareness-raising materials for different stakeholder groups.
- g) *Ad hoc technical support* - The contractor shall provide ad hoc technical advisory services to respond to emerging implementation-related needs throughout the duration of the assignment. Activities may include:
- Review technical documents.
 - Participate in technical meetings.
 - Respond to technical queries.
 - Provide expert opinions.
 - Support implementation-related decision-making.

The exact activities based on the above shall be determined at the start of the project in coordination with the partner institutions, and the contractor shall develop a detailed work plan outlining the activities and delivery period.

Advisory services will be provided remotely through virtual means as well as through in-country missions. Specifics regarding the place of service will be demand-based and agreed upon during project implementation.

Typical milestones to be achieved during the contract term are laid out below.

Table 3: Milestones for each country in Work Package 3

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Milestones	Delivery period
Kick-off meeting	1 week after the start of the WP
Implementation workplan and needs assessment completed	1 month after start of the country activities
Implementation roadmap delivered	2 - 3 months after start of country activities
Monitoring and evaluation framework developed	2 - 3 months after start of the country activities
Final implementation support outputs delivered	4 - 9 months after start of country activities

2.3 Project and knowledge management requirements

Requirements on the assignment of experts:

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

Requirements on equipment and operating costs:

- The contractor makes the required 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.

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 areas:
 - Degree to which activities are implemented
 - Degree to which the objectives, indicators and milestones listed in section 2.2 of these ToRs have been achieved
 - Results that have occurred in the contractor's sphere of responsibility
 - Results that have occurred outside the contractor's direct sphere of responsibility
 - Risks

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 reports in the following language: English.

In addition to the reports provided for in GIZ's General Terms and Conditions of Contract, the contractor submits the following reports:

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- Contributions to the report to GIZ's commissioning party, including, for example the number of people trained disaggregated by gender and the degree of learning achieved through the training
- Brief quarterly reports on the implementation status of the project (3-5 pages) outlining progress made, time line, key challenges met and outlook on next steps.
- A final report reflecting on the implementation of the project, key challenges, and lessons learned.

Requirements for company-wide learning, knowledge and innovation:

- Contributions to conferences, if applicable, in line with WP2 and WP3.
- The contractor provides support in implementing a project evaluation with special emphasis on ensuring the effectiveness of the knowledge management process.

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:

- Service-delivery control;
- The contractor's responsibility for its own as well as seconded 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 and conclusion 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.

The backstopping strategy is part of the evaluation (see sections 3.4 and 3.5 below).

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:

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In order 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:**

In decision-making processes, competence building measures and other activities, attention is paid, as far as possible, to the balanced participation of women and men and the promotion of opportunities for women.

The contractor's staffing profile should be balanced in terms of gender and age.

- **Security:**

The contractor applies security measures of respective country as indicated by GIZ Risk Management Office (RMO). This will be communicated to the contractor once the overall planning for the services is established.

- **Property rights and rights of use:**

For more information related to these requirements please refer to section 1.10 of GIZ's general terms and conditions .

- **Design:**

When designing materials relating to the contract which are intended for use with third parties (e.g. publications, presentations), GIZ's Corporate Design Center rules (<https://www.giz.de/cdc/en/html/59557.html>) and all other GIZ specifications must be followed. The design must also be agreed with GIZ and in the event of direct cooperation also with the responsible partner institution in the country of assignment.

All the project outputs and materials called for by these Terms of Reference, including reports and other creative work, in written, graphic, audio, visual, electronic or other forms, shall acknowledge BMZ, GIZ and the EU and contain their respective logos. The design must be agreed with GIZ and in the event of direct cooperation also with the responsible partner institution in the country of assignment. For more information related to GIZ's corporate design, please refer to section 1.8 of GIZ's general terms and conditions

The contractor must always express in an appropriate way that its activities are on behalf of BMZ and the EU and in cooperation with GIZ.

For more information related to these requirements please refer to section 1.8 of GIZ's general terms and conditions.

- **Quality assurance:**

The GIZ team will review the outputs under WPs 1-3 for their respective purpose and target group. GIZ will provide references to existing documents and training materials as an orientation to indicate the required quality and scope of the respective outputs. In addition, the EU Commission / SFAH Secretariat will be involved through GIZ as lead implementing

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partner by providing feedback on deliverables, inputs on good practices in taxonomy development and working materials or guidance on methods (e.g. a methodology for taxonomy comparison studies). Only after GIZ provides clearance for outputs these will be regarded as final.

The contractor will ensure that all outputs are professionally copy-edited, ensuring clarity, succinctness, readability and flow of contents before submission to GIZ.

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), by:

- undertaking an assessment of the appropriateness of the personnel concept for implementing the scheduled tasks;
- providing an assessment of the results hypotheses for achieving the objectives and possible risks in implementation;
- making an assessment of the technical concept, e.g. in consideration of further sectors or actors, process adjustments, etc.

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

The tenderer is required to describe in a general way or according to relevant previous experiences, the processes in the sector or partner system that are relevant to the services

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put out to tender (section 1.2.1 of the assessment grid). This should not be linked to individual countries but described in a general manner.

The tenderer is required to present the actors (partners and others) who are relevant for the tender in the form of a map of actors. The actors should be described in a general manner, not linked to individual countries. Their mandates as well as strengths, weaknesses and interests with respect to the services put out to tender are also to be briefly presented (section 1.2.2 of the assessment grid). This shall be described based on experiences of cooperating with these actors in different countries and can be generalised.

In addition, the tenderer is required to describe the interaction between the actors mentioned above. This can consist of relevant examples of the specific collaboration between individual actors in the processes listed above, according to relevant previous experiences of the tenderer, 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 equality)
- Appropriate consideration of further requirements

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 the implementation strategy with a description of important activities or lines of action it plans to in order to achieve the milestones, objectives and results (see section 2) for which it is responsible.

3.3.2 Building partnerships with the relevant actors (section 1.3.2 of the assessment grid)

The tenderer is required to develop and describe a strategy for developing the cooperation with the actors in the partner system who are relevant for the implementation of the services in the tender. The project partnerships already mentioned in section 1 must also be taken into account.

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3.3.3 Approaches for leverage effects and measures for scaling-up
(section 1.3.3 of the assessment grid)

Not applicable

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 (see also relevant requirements in section 2.5).

Requirement: 'Gender equality':	10 points out of 10 (maximum)
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3.4 Project management
(section 1.4 of the assessment grid)

In this section, the tenderer presents the operational plan for implementing the services in the tender, describes the procedure for coordination with GIZ or the project and the project partners, and explains its backstopping strategy and the 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 present a strategy for dealing with flexible assignment locations of the individual experts, the milestones as presented in section 2 and, in particular, describe all the necessary work stages in detail and in chronological order. The tenderer can define further milestones beyond those prescribed in section 2 and map them out in the plan of operations.

3.4.2 Coordination with GIZ or the commissioning project
(section 1.4.2 of the assessment grid)

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

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3.4.3 Steering or coordination of measures with the relevant implementing partner (section 1.4.3 of the assessment grid)

In the tender, the tenderer is required to describe and explain, in a general way or based on relevant previous experience, the procedure for steering or coordinating the measures with implementing partners.

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 how it will provide technical and administrative support to ensure the project is completed on time, within budget, and to the required quality standards. The tenderer needs to demonstrate how to identify and address any issues that may arise during the project implementation phase. A CV must be provided for the position of technical and administrative backstopping. These CVs will be used to verify the backstopping strategy.

4. Personnel

The tenderer is required to provide 'experts' for the positions referred to and described (scope of tasks and qualifications) in this section on the basis of 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.

Key-Expert 1: Team leader (section 2.1 of the assessment grid)

This position is a key expert.

Tasks of expert 1: (Team Leader)

- Overall responsibility for the work packages of the contractor

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- Ensuring quality-control of deliverables
- Ensuring the coherence and complementarity of the contractor's services with other services delivered by the project at local and national level
- Representing international consultancy during meetings with GIZ and/or partners
- Design, implementation, monitoring and evaluation of capacity development measures for local partners in the area of taxonomy development
- Responsibility for taking cross-cutting themes into consideration (for example, gender equality)
- Staff management, in particular identifying the need for short-term assignments within the available budget, planning and managing the assignments and supporting local and international experts
- Ensuring that monitoring procedures are carried out
- Regular reporting in accordance with deadlines
- Responsibility for checking the use of funds and financial planning in consultation with the officer responsible for the commission at GIZ
- Supporting the officer responsible for the commission in updating and/or adapting the project strategy, in evaluations and in preparing a follow-on phase
- Supporting backstopping team (refer to section 2.3 for more details)

Qualifications of expert 1: (Team leader)

Education/training (section 2.1.1 of the assessment grid):	University degree (e.g. 'master's or German Diplom') in Economics, Finance, or Business Administration
Language (section 2.1.2 of the assessment grid):	Knowledge of English, C1-level in the Common European Framework of Reference for Languages. (7 out of 10 Points) Knowledge of French, C1-Level in the Common European Framework of Reference for Languages. (3 out of 10 Points)
General professional experience (section 2.1.3 of the assessment grid):	10 years of professional experience in sustainable financial sector development and reform
Specific professional experience (section 2.1.4 of the assessment grid):	4 years of professional experience in overseeing and guiding national sustainable finance taxonomy development processes
Leadership/management experience (section 2.1.5 of the assessment grid):	7 years of management experience in projects, companies or other organisations with disciplinary leadership responsibility for 5 people

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International professional experience outside the country/region of assignment (section 2.1.6 of the assessment grid):	3 years of professional experience in one non-Official Development Assistance (ODA) eligible country ¹
Professional experience in the country/ region of assignment (2.1.7 of the assessment grid):	3 years of professional experience Latin America & the Caribbean (3 out of 10 points) and Asia (3 out of 10 points) and Sub-Saharan-Africa (4 out of 10 points) (in accordance with UN DESA Statistics Division)
Experience in the field of development cooperation (section 2.1.8 of the assessment grid):	3 years of experience in development cooperation projects
Other (section 2.1.9 of the assessment grid):	3 years of experience in drafting sustainable finance taxonomies. (6 out of 10 Points) 3 years of experience working on or with the EU Taxonomy (4 out of 10 Points)

Expert 2: Pool 1 ‘Policy Experts’ with 2 - 4 experts (section 2.2 of the assessment grid)

In derogation from the number of experts mentioned above, **2 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.

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

Tasks of the expert pool

- Main responsibility for WP1 with support of WP2 and WP3 where needed

¹ OECD Development Assistance Committee (DAC) List of ODA Recipients.

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- Lead the preparation and finalisation of policy papers (e.g. strategy paper, implementation roadmap or implementation guides) in consultation with expert pool 2.
- Engage with the technical consultants to gather relevant insights and feedback from on-the-ground work.
- Complement insights by analysing relevant policies, regulations, and frameworks within the partner country as well as global developments to inform development of policy document.
- Organize and facilitate stakeholder consultations and meetings to discuss and refine policy proposals.

Qualifications of the expert pool

Education/training (section 2.2.1 of the assessment grid):	All experts, each with a university degree (e.g. 'master's or German Diplom') in political science, public policy, economics, or geography.
Language (section 2.2.2 of the assessment grid):	All experts, each with knowledge of English, C2-level in the Common European Framework of Reference for Languages.
General professional experience (section 2.2.3 of the assessment grid):	All experts, each with 6 years of professional experience in the field of public and economic policy.
Specific professional experience (section 2.2.4 of the assessment grid):	All experts, each with 5 years of professional experience in sustainable financial sector development and reform. (6 out of 10 Points) All experts, each with 3 years of professional experience in the area of sustainable finance regulation. (4 out of 10 Points)
Leadership/management experience (section 2.2.5 of the assessment grid):	Not applicable
International professional experience outside the country/region of assignment (section 2.2.6 of the assessment grid):	All experts, each with with 3 years of professional experience in one non-ODA eligible country.
Professional experience in the country/ region of assignment (2.2.7 of the assessment grid):	3 experts, each with 5 years of professional experience in ODA eligible countries. (not assessed)

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Experience in the field of development cooperation (section 2.2.8 of the assessment grid):	All experts, each with 3 years of experience in development cooperation projects (not assessed)
Other (section 2.2.9 of the assessment grid):	Not applicable

Expert 3: Pool 2 ‘Taxonomy Experts with international experience’ with 6-20 experts
(section 2.3 of the assessment grid)

In derogation from the number of experts mentioned above, **3 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.

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

Tasks of the expert pool

- Main responsibility for WP2 and WP3 with limited support of WP1
- Implement specific assignments as set out in Chapter 2, this includes governance, strategic, technical, and capacity building support;
- Collaborate closely with partners and the GIZ team (in country of implementation and HQs);
- Collaborate closely with and provide guidance to expert pool 4.

Qualifications of the expert pool

Education/training (section 2.3.1 of the assessment grid):	All experts, each with a university qualification (German ‘Diplom’/Master or equivalent) related to sectors relevant to taxonomies (e.g. energy, water, transport, construction, manufacturing, agriculture, circular economy, biodiversity or similar) Climate and Environmental Finance, Economics, Finance, or Business Administration or related studies For the 3 example CVs:
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	2 experts, each with a university qualification related to sectors relevant to taxonomies (energy, water, transport, construction, manufacturing, agriculture, circular economy, biodiversity) (5 out of 10 Points). 1 expert with a university degree (e.g. 'master's or German Diplom') in Climate and Environmental Finance, Economics, Finance, or Business Administration (3 out of 10 Points) 1 expert with a widely acknowledged certificate in sustainable finance or climate finance (e.g. CFA, or certificates from reputable universities such as LSE, Oxford etc.) (2 out of 10 points)
Language (section 2.3.2 of the assessment grid):	All experts, each with knowledge of English, C2-level in the Common European Framework of Reference for Languages. 2 experts, each with knowledge of French, C2-Level in the Common European Framework of Reference for Languages. 2 experts, each with Knowledge of Spanish, C2-Level in the Common European Framework of Reference for Languages 2 experts, each with Knowledge of Portuguese, C1-Level in the Common European Framework of Reference for Languages. For the 3 example CVs: All experts, each with knowledge of English, C2-level in the Common European Framework of Reference for Languages. (4 out of 10 Points) 1 expert with Knowledge of French, C2-Level in the Common European Framework of Reference for Languages. (2 out of 10 Points) 1 expert with Knowledge of Spanish, C1-Level in the Common European Framework of Reference for Languages. (2 out of 10 Points) 1 expert with Knowledge of Portuguese, C1-Level in the Common European Framework of Reference for Languages (2 out of 10 Points).
General professional experience (section 2.3.3 of the assessment grid):	All experts, each with 5 years of professional experience in the field of climate and environmental science with policy

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	and/or implementation work on climate change mitigation and /or climate change adaptation & resilience. (6 out of 10 Points) All experts, each with 3 years of professional experience in sustainable financial sector development and reform. (4 out of 10 Points)
Specific professional experience (section 2.3.4 of the assessment grid):	All experts, each with 5 years of experience providing strategic advice on economic sector-specific (e.g. energy, water, transport, construction, manufacturing, agriculture, circular economy, biodiversity or similar) and cross-cutting issues such as climate change mitigation and climate change adaptation & resilience. (5 out of 10 Points) All expert, each with 3 years of professional experience in the area of sustainable finance taxonomies, their core components (objectives and principles, technical screening criteria, DNSH criteria, minimum safeguards) , and methods of development. (4 out of 10 Points) 1 expert with 3 years of experience preparing and conducting trainings on sustainable finance and taxonomies (1 out of 10 points).
Leadership/management experience (section 2.3.5 of the assessment grid):	Not applicable
International professional experience outside the country/region of assignment (section 2.3.6 of the assessment grid):	All experts, each with 3 years of professional experience in one non-ODA eligible country.
Professional experience in the country/ region of assignment (2.3.7 of the assessment grid):	All experts, each with 2 years of professional experience in an ODA-eligible country (4 out of 10 Points). 2 experts, each with each 2 years of experience in Sub-Saharan Africa according to the UN DESA Statistics Division. (2 out of 10 Points) 2 experts, each with 2 years of experience in Latin America and the Caribbean according to the UN DESA Statistics Division. (2 out of 10 Points)

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	2 experts, each with 2 years of experience in Asia (2 out of 10 points)
Experience in the field of development cooperation (section 2.3.8 of the assessment grid):	All experts, each each 3 years of experience in development cooperation projects in ODA-eligible countries
Other (section 2.3.9 of the assessment grid):	Not applicable

Expert 4: Pool 3 ‘Junior Expert Pool with international experience’ with 2 -6 experts

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

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

Tasks of the expert pool

- Support implementation of specific assignments as set out in Chapter 2, this includes supporting the experts pools 1 and 2 in terms of governance, strategic, technical, and capacity building technical assistance they provide in all WPs;
- Support experts pools 1 and 2 in collaborating with partners and the GIZ team (in country of implementation and HQs);
- Support engagements with the national expert pool.

Qualifications of the expert pool

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Education/training	2 experts with a university qualification related to sectors relevant to taxonomies (e.g. energy, water, transport, construction, manufacturing, agriculture, circular economy, biodiversity or similar). 2 experts with a university degree (e.g. 'master's or German Diplom') in <i>Climate and Environmental Science or Finance</i>, Economics, Finance, Business Administration, Urban Planning or similar studies.
Language	All experts, each with knowledge of English, C2-level in the Common European Framework of Reference for Languages. 1 expert with Knowledge of French, B2-Level in the Common European Framework of Reference for Languages. 1 expert with Knowledge of Spanish, B2-Level in the Common European Framework of Reference for Languages. 1 expert with Knowledge of Portuguese, B2-Level in the Common European Framework of Reference for Languages.
General professional experience	All experts, each with 2 years of professional experience in the field of climate and environmental science including policy and/or implementation work on climate change mitigation and /or climate change adaptation & resilience. All experts with each 1.5 years of professional experience in financial sector development and reform.
Specific professional experience	All experts, each with 2 years of experience providing strategic advice on economic sector-specific (e.g. energy, water, transport, construction, manufacturing, agriculture, circular economy, biodiversity or similar) and cross-cutting issues such as climate change mitigation and climate change adaptation & resilience. All expert, each with 1 year of professional experience in the area of sustainable finance taxonomies, their core components, and methods of development. All experts, each with 2 years of professional experience in sustainable finance.
Leadership/management experience	Not applicable

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International professional experience outside the country/region of assignment	All experts, each with 3 years of professional experience in one non-ODA eligible country.
Professional experience in the country/ region of assignment	All experts, each with 3 years of professional experience in one non-ODA eligible country. All experts, each with 1 year of professional experience in ODA eligible countries. 2 experts, each with 1 year of experience in Sub-Saharan Africa according to the UN DESA Statistics Division. 2 experts, each with 1 year of experience in Latin America and the Caribbean according to the UN DESA Statistics Division. 2 experts, each with 1 year of experience in Asia.
Experience in the field of development cooperation	All experts, each with 2 years of experience in development cooperation projects in ODA eligible countries.
Other	Not applicable

Expert 5: Pool ‘Experts with national experience’ with 9, - 16 experts (section 2.4 of the assessment grid)

The focus of this contract is on developing countries and the applicable countries will be communicated ahead of the kick-off meeting, after GIZ has received a request for support from the partner country or the funders). In derogation from the number of experts mentioned above, **only 2 CVs** must be added to the tender. The ability of the tenderer to offer a larger pool of experts is assessed **solely on the basis of these exemplary CVs** under section 2.5 of the assessment grid. However, additional experts are already mentioned in the personal concept in order to have access to them during the project implementation without having to amend the contract.

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

Tasks of the expert pool

- Implement specific assignments as set out in Chapter 2, this includes governance, strategic, technical, and capacity building support in all WPs;

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- Collaborate closely with partners and the GIZ team (in country of implementation and HQs);
- Collaborate closely with expert pools 1, 2 and 3.

Qualifications of the expert pool

Education/training (section 2.4.1 of the assessment grid):	4 experts, each with a university degree (e.g. 'master's or German Diplom') related to sectors relevant to taxonomies (e.g. energy, water, transport, construction, manufacturing, agriculture, circular economy, biodiversity or similar). (not assessed) 2 experts, each with university qualification (German 'Diplom'/Master or equivalent) in Climate and Environmental Finance, Economics, Finance, Business Administration or similar. (not assessed) Example CVs for assessment: 1 expert with a university degree (e.g. 'master's or German Diplom') related to sectors relevant to taxonomies (e.g. energy, water, transport, construction, manufacturing, agriculture, circular economy, biodiversity or similar). (7 out of 10 Points) 1 expert with university qualification (German 'Diplom'/Master or equivalent) in Climate and Environmental Finance, Economics, Finance, Business Administration or similar. (3 out of 10 Points)
Language (section 2.4.2 of the assessment grid):	2 experts with Knowledge of French, C2-Level in the Common European Framework of Reference for Languages. (not assessed) 2 experts with Knowledge of Portuguese, C2-Level in the Common European Framework of Reference for Languages. (not assessed) 2 experts with Knowledge of Spanish, C2-Level in the Common European Framework of Reference for Languages. (not assessed) Example CVs for assessment: 2 experts with knowledge of English, C1-level in the Common European Framework of Reference for Languages. (10 out of 10 Points)

General professional experience (section 2.4.3 of the assessment grid):	All expert with each 6 years of professional experience in a sector relevant to taxonomies (e.g. energy, water, transport, construction, manufacturing, agriculture, circular economy, biodiversity or similar) (not assessed) 4 experts, each with 3 years of professional experience in the financial sector (not assessed) Example CVs for assessment: 2 experts, each with 6 years of professional experience in a sector relevant to taxonomies (e.g. energy, water, transport, construction, manufacturing, agriculture, circular economy, biodiversity or similar). (6 out of 10 Points) 1 expert with 3 years of professional experience working in a financial institution. (4 out of 10 Points)
Specific professional experience (section 2.4.4 of the assessment grid):	All experts, each with 4 years of professional experience in advising on policy reform in a sector relevant to taxonomies (e.g. energy, water, transport, construction, manufacturing, agriculture, circular economy, biodiversity or similar), e.g. providing diagnostic advice for reforms, proposing reforms, supporting reform processes. (not assessed) 4 experts, each with with 4 years of professional experience in financial sector development and reform, sustainable finance or taxonomies. (not assessed) Example CVs for assessment: 2 experts with each 4 years of professional experience in advising on policy reform in the region in a sector relevant to taxonomies (e.g. energy, water, transport, construction, manufacturing, agriculture, circular economy, biodiversity or similar), e.g. providing diagnostic advice for reforms, proposing reforms, supporting reform processes. (6 out of 10 Points) 1 expert with 4 years of professional experience in financial sector development and reform, sustainable finance or taxonomies. (4 out of 10 Points)
Leadership/management experience (section 2.4.5 of the assessment grid):	Not applicable

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International professional experience outside the country/region of assignment (section 2.4.6 of the assessment grid):	Not applicable
Professional experience in the country/ region of assignment (2.4.7 of the assessment grid):	3 experts with 5 years of professional experience in the country of question. (not assessed)
Experience in the field of development cooperation (section 2.4.8 of the assessment grid):	All experts with each 3 years of experience in development cooperation projects (not assessed)
Other (section 2.4.9 of the assessment grid):	Not applicable

UN DESA regions are defined as East Africa, Central Africa, North Africa, Southern Africa, West Africa, South America, the Caribbean, Central America, North America, Central Asia, East Asia, South Asia, Southeast Asia, West Asia/Middle East, Eastern Europe, Northern Europe, Southern Europe, Western Europe, Australia, Melanesia, Micronesia and Polynesia; refer to [UN DESA 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 actually 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.

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Staff presentation

(section 2.11 of the assessment grid)

Not applicable.

5. Costing requirements

In your tender, please do not deviate from the quantities and budgets specified in these ToRs and the price schedule. These are part of the competitive tender procedure and are used to ensure that the tenders can be compared objectively. Please note: only inputs 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 Conditions, section 3.6.2)
Key-Expert 1: Team Lead	52	8	60	No
Expert 2: Pool 1 Policy Experts	70	0	70	No
Expert 3: Pool 2 Taxonomy Experts with international experience	530	50	580	No
Expert 4: Pool 3 Junior Experts with	115	20	135	No

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international experience				
Expert 5 : Pool 4 Experts with national experience	10	125	135	No
Backstopping	Not applicable	Not applicable	Not applicable	Not applicable

5.2 National administrative staff

– Not applicable –

5.3 Travel expenses

5.3.1 Travel – sustainability considerations

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

CO₂ emissions caused by air travel should be offset if they cannot be avoided. GIZ specifies a budget for this which enables carbon offsets to be settled against evidence.

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

5.3.2 Travel expense requirements

Travel expenses budget: **EUR 80,000**

Budget for CO₂ offsets for flights: **EUR 1,200**. An unalterable budget is to be set up for CO₂ offsets to be settled against evidence.

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

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- Per-diem allowances and accommodation allowances
- Flights
- Transfer costs
- Cost of obtaining a visa

Per-diem allowances will be reimbursed as a lump sum (up to the maximum amounts permissible under tax law for each country) as set out in the country table in the circular from the German Federal Ministry of Finance on the reimbursement of travel expenses (see <https://www.bundesfinanzministerium.de>).

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

- Accommodation allowances up to 75% (of the maximum amounts permissible under tax law as per the BMF circular on travel expense reimbursement will be reimbursed **on a lump-sum basis**.
- Accommodation allowances up to the maximum amounts permissible under tax law as per the BMF circular on travel expense reimbursement will be reimbursed in the **amount evidenced**.
- Accommodation allowances outside Germany that unavoidably exceed the maximum amount permissible under tax law as stipulated in the BMF circular on travel expense reimbursement) (e.g. due to security requirements) **can only be settled against evidence on presentation of a written individual justification**.

Costs incurred for flights and transfers and for obtaining visas will be reimbursed against evidence.

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

Please note: These travel expense items do not cover costs related to the contract in the country of assignment (see section 3.6.2 of the General Terms and Conditions). Please cost these items if applicable in the price schedule under '2.2 Costs related to the contract in the country of assignment'.

5.4 Materials and equipment

– Not applicable –

5.5 Operating costs in the country of assignment

– Not applicable –

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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 90,000**

The fixed, unalterable budget above is earmarked in the price schedule for flexible remuneration. Flexible remuneration is intended to facilitate the flexible management of the contract by the commission manager at GIZ. The contractor can make use of the funds in accordance with section 3.6.5.7 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 tender must be written in English.

The technical-methodological concept of the tender (section 3 of the ToRs) must not exceed 20 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 **Fehler! Verweisquelle konnte nicht gefunden werden.** of the ToRs must be in the EU format and not more than four pages in length each. The CVs are to be submitted in English.

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)

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- 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)

In order 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.

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 options if it wishes to expand the tendered services. This is described in detail below.

Nature and scope:

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

Preconditions:

- a) 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; **or**
- b) Additional request(s) for technical assistance on sustainable finance taxonomies is received from partner institutions of the respective country, provided that the requested services fall within the scope of this Terms of Reference.

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

Not applicable.

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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:

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

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

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

8. Annexes

not applicable