

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

CONFIDENTIAL

Project title: Eastern Caribbean GIZ portfolio

Region: Caribbean

Subject of the tender procedure:

Monitoring, Evaluation, Learning and Communications support to the GIZ Eastern Caribbean portfolio of projects

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0. List of abbreviations

BMZ	German Ministry for Economic Cooperation and Development
CARICOM	Caribbean Community
CD	Capacity Development
CLIRES	Climate Resilient and Sustainable Energy Supply in the Caribbean
EU	European Union
GDPR	General Data Protection Regulation
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
GTC	General Terms and Conditions of Contract for supplying services and work on behalf of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
ICT	Information and Communication Technology
KAP	Knowledge, Attitude and Practices
KPI	Key Performance Indicators
M&E	Monitoring and Evaluation
MPA	Marine Protected Area
OECS	Organisation of Eastern Caribbean States
SDG	Sustainable Development Goal
SEO	Search Engine Optimisation
SIDS	Small Island Developing States
TVET	Technical and Vocational Education and Training
ToRs	Terms of reference
UI	User Interface
UX	User Experience

1. Context

The *Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH* is a service provider in the field of international cooperation for sustainable development and international education work, with worldwide operations on behalf of the German Government and other commissioning parties. GIZ supports change processes in developing countries and emerging economies by providing tailor-made, cost-efficient, and effective services for sustainable development. The *German Federal Ministry for Economic Cooperation and Development (BMZ)* is GIZ's primary commissioning party, working in partnership with regional organizations, national governments, civil society, and the private sector to address global challenges and achieve the Sustainable Development Goals (SDGs).

Within the Caribbean, BMZ has prioritized climate resilience, environmental sustainability, and inclusive economic transformation, channeling these commitments into regional programming supported by GIZ. The Caribbean region faces persistent and interrelated problems that demand urgent attention and evidence-based solutions. Climate change impacts—including more intense hurricanes, sea-level rise, saltwater intrusion, and coastal erosion—pose existential risks to small island states. Marine and terrestrial biodiversity are under pressure from unsustainable practices, habitat loss, and pollution, while waste management systems remain inadequate. Energy systems are overly dependent on fossil fuels, exposing economies to high costs and volatility. Meanwhile, high youth unemployment and underdeveloped technical skills restrict economic opportunity and undermine resilience. Together, these challenges threaten sustainable development pathways and highlight the critical need for effective, integrated, and responsive programming.

Commissioned by the BMZ, the new portfolio of six GIZ projects with the Caribbean Community (CARICOM) and its currently 15 member states reflects these strategic priorities and includes the following project interventions:

- 1) Climate-sensitive Circular Economy in the Caribbean;
- 2) Climate Resilient and Sustainable Energy Supply in the Caribbean (CLIRES II);
- 3) Promoting Regionally Harmonized Approaches to Conservation and Sustainable Use of Biodiversity;
- 4) Unlocking the Blue Economy Potential of Marine Protected Areas in Small Island Developing States in the Eastern Caribbean;
- 5) Combating Climate Change with a Specific Training Focus in the Caribbean / Skills for Blue and Green Jobs; and
- 6) Productive Use of Organic Waste and Sargassum in the Caribbean.

All six regional projects started in late 2025 and will run until 2028/2029. The main executing partner is the CARICOM Secretariat, based in Guyana. Individual country-level implementation is focused mainly, but not entirely, on Dominica, Grenada, St. Lucia and St. Vincent and the Grenadines. The GIZ project office for all new projects is in St. Lucia. The GIZ Regional Office is in Santo Domingo, Dominican Republic, responsible for the wider Caribbean portfolio.

The six new projects - though each with a specific focus – have great potential for synergies because they all fall within the “green” sector and are in their very early stages of implementation allowing for pooling of staff, services and resources. To leverage synergies between the projects, GIZ St. Lucia is seeking to contract a service provider that can provide a range of short- and long-term communication as well as monitoring and evaluation (M&E) services for the new portfolio.

Background on the GIZ approach to communication

Effective communication is essential for building trust, garnering support, and maintaining transparency in development initiatives. Between 2020-2021, in response to the BMZ's exit from the Dominican Republic, a stronger structure for portfolio development was established within GIZ Caribbean for acquiring new projects. However, a strategic approach to strengthening visibility and recognition of BMZ funded and GIZ implemented initiatives in the Caribbean region has been identified as a gap that needs to be addressed.

Currently, GIZ Caribbean has limited communication and visibility processes at a portfolio level, with projects communicating through their individual channels. In 2023, an internal "Regional Communication Group" was established but discontinued due to a lack of engagement and communication personnel. Currently, two projects have dedicated communication staff, while others rely on team members with additional responsibilities. Communication strategies vary, with some projects following structured plans while others lack clear guidelines. Existing projects produce fact sheets, short videos, and awareness campaigns, with varying levels of consistency and adherence to GIZ corporate identity guidelines.

The GIZ Caribbean webpage (<https://www.giz.de/en/regions/latin-america-caribbean/caribbean>) is managed by the Corporate Communications Department at Headquarters in Germany and provides basic thematic information in English and German, as well as links to the external GIZ project websites. Social media presence includes an Instagram account (@giz_caribbean) with bilingual posts to accommodate Spanish and English speaking audiences. The account has 1379 followers (as of October 2025) tagging commissioning parties for visibility requirements and implementing partners from the public and private sectors. Most posts are collaborated posts to reduce time in content designing and uploading. A YouTube channel (<https://www.youtube.com/@gizcaribbean2709>) with 12 videos exists but is inactive, with no known access credentials. It was set-up in 2024 and has 152 subscribers.

At the time of launching this tender, no communication services have been provided to the six new projects and a joint communication strategy has yet to be developed. However, at least two GIZ projects in the region have communication staff as well as extensive experience in the area. A GIZ Caribbean Communication Strategy was developed in January 2025. The Strategy will be provided to the sub-contractor after contract award. It is fundamental that an overarching portfolio narrative is developed so that the six new projects do not communicate in isolation but are recognizable as a joint and integrated effort of the overall portfolio of GIZ implemented interventions in the CARICOM region.

To address the communication needs of the new portfolio – specifically of the six above mentioned projects - GIZ St. Lucia is seeking to contract a service provider that can provide a range of short- and long-term communication services. These include, but are not limited to crafting compelling narratives, utilizing various media channels, managing public relations that attract beneficiaries and showcase the impact of the portfolio, and in addition meet the expectations of visibility and impact communication of the commissioning party BMZ. The services requested under this contract will complement the available in-house strategic, corporate and operational capacity and services.

Background on GIZ's approach to Results-based Monitoring & Evaluation

GIZ follows a results-based monitoring approach to ensure that development objectives are met through effective planning and control. Results-based monitoring ensures that any progress made is continuously and systematically monitored and documented.

While each of the six GIZ projects has its own M&E mechanisms, these systems vary in scope, methodology, and rigor, and do not always allow for comparability or cross-learning across projects. The absence of a harmonized M&E framework limits the ability to capture synergies, generate portfolio-level insights, and provide coherent reporting to BMZ and other stakeholders. Moreover, the lack of systematic monitoring and evaluation constrains adaptive management and reduces opportunities to strengthen institutional capacities for results-based monitoring at the national and regional levels.

The rationale for this M&E assignment is therefore: a consolidated and professional results-based M&E framework is required to ensure that the substantial investments made through the new projects are effectively monitored, assessed, and leveraged for learning. By establishing robust and harmonized M&E systems, the assignment will enhance accountability, generate credible evidence for decision-making, and support knowledge-sharing across the Caribbean. The contractor will not only ensure compliance with BMZ and GIZ standards but will also contribute to building a culture of evidence-based management within CARICOM and its member states, strengthening the long-term sustainability and impact of these initiatives.

The M&E services should, where relevant, inform the communication services and vice versa. At the same time, the integrity of both communications and M&E functions, acknowledging their unique and vital contribution, will be maintained.

Annex 1 provides summaries of the six projects which this contract will support on Communications and Monitoring and Evaluation.

Annex 2 provides a list of Standards Indicators that five of the six projects have to report on, over and above the indicators of the individual results matrices.

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 Work packages, milestones

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

Work package 1: Communication strategy development and advice

The aim of work package 1 is to take stock of the current GIZ Caribbean communication strategy, its elements, roles and responsibilities and current planned activities, the existing GIZ project-specific communication strategy elements and plans, and the communication strategies and plans of relevant partners. Based on the findings, an integrated communication strategy and plan, linking where possible communications and monitoring & evaluation for the new six projects will be developed with specifics for each project. The contractor will broadly follow the following steps:

1.1 Communication strategy analyses:

- Evaluation of existing communication strategies and M&E frameworks. Guiding questions include among others: What are the key narratives and messages at different levels? Are GIZ Caribbean projects reaching their target audiences? Are the channels, materials and formats appropriate to achieve the communication and linked M&E objectives? How are GIZ's partners (e.g. CARICOM, Organisation of Eastern Caribbean States - OECS) communicating and how can synergies be created? Are the communication capacities and budgets used effectively and efficiently to contribute to the success?
- Upon award of the contract, the contractor will be granted access to the current communication strategies, plans and products, M&E frameworks, GIZ Caribbean detailed projects descriptions, the social media accounts and other relevant information for analysis purposes.
- Analyse existing Knowledge, Attitude and Practices (KAP) surveys and other relevant research conducted in the CARICOM region to inform the development of the strategy.

1.2 Communication strategy development:

- The overall goal of the strategy development step is to create an integrated (internal and external) communication strategy framework that links communication and M&E at different levels (GIZ portfolio and individual projects).
- The contractor will support reviewing and developing a joint portfolio narrative and an umbrella communication strategy comprising all six projects. This requires the contractor to understand the uniting elements of the six new projects. The contractor will recommend communication goals, target groups, processes, roles and responsibilities, resources, formats and instruments, including a content strategy with specific visual guides and operational plans for content dissemination. As much as possible, the strategy should also be a blueprint for the rest of the GIZ Caribbean portfolio of projects.
- Based on the umbrella strategy, more specific, individual communication pillars for each project will be developed. This should include, among others:
 - Formulation of qualitative and quantitative communication objectives
 - Target group analysis, definition of personas and derivation of relevant communication channels, also on the basis of previous efforts in this field
 - Formulation of target group-specific core/key messages
- On an as need basis, the contractor will provide ongoing support to the GIZ Caribbean in implementing the proposed changes. The specific scope of such support will be defined during the course of the implementation of the agreed Communication Strategy.

- This work package requires working with GIZ Caribbean communication staff and other team members, as necessary. It might also require conducting online workshops with relevant GIZ (Caribbean) team members; regular convening and status updates on implementation are required.

1.3 The external communication strategy and links to the M&E framework

Even if the projects are independent, they share goals, themes, and corporate visibility requirements. Currently the portfolio is exclusively BMZ funded, but in the future, third party co-funding may require adaptations to take account of co-funder's requirements. The communication strategy should therefore create **coherence and value-add at portfolio level**, while respecting the **distinct mandates** of each project. Key elements of and tasks for the strategy development include but are not limited to:

Strategy Foundation

i. Purpose & Objectives

The external communication strategy should aim to:

- Demonstrate portfolio-level impact and contribution to BMZ priority areas.
- Ensure coherent, accurate, and compliant visibility for BMZ and GIZ.
- Strengthen the reputation of the portfolio among partners, beneficiaries, and the public.
- Prevent fragmentation by harmonizing messaging across independent projects.
- Showcase synergies and innovations arising from cross-project collaboration.
- Contribute to political dialogue, partner ownership, and scalability.

ii. Target Audiences

Primary external audiences:

- BMZ headquarters & BMZ representation in German Embassies
- Partner ministries / government institutions
- Bilateral and multilateral donors
- Private-sector partners and foundations
- General public (Germany and partner country)

Secondary external audiences:

- Civil society organizations
- Academia & experts
- Media (local and international)
- Beneficiaries and local communities

Each audience will require a distinct tone, format, and frequency of communication.

iii. Key Messages & Portfolio Narrative

Assist in the development of a shared overarching narrative at portfolio level:

- What unifies the projects (shared themes, approaches, target groups)?
- What development challenges are addressed across the portfolio?
- How does the portfolio contribute to BMZ strategies (e.g., BMZ 2030 Reform Strategy, core areas)?

- What principles guide implementation (e.g., sustainability, partner ownership, gender, inclusion)?

to define:

- **Portfolio-level core messages** (consistent across all outputs)
- **Project-specific messages** (tailored to individual objectives)

iv. **Communication Products & Channels**

Define communication channels and formats, along with ownership and purpose.

Typical BMZ/GIZ-compliant formats:

- Portfolio / Project factsheet
- Success stories / Impact stories
- BMZ result cards
- Short videos / social media materials
- Press releases (aligned with BMZ & GIZ media guidelines)
- Joint publications with partner ministries
- Knowledge products (policy briefs, technical papers)
- Website pages or thematic sub-pages
- Events, conferences, partner dialogues
- Photo documentation and visibility materials

v. **Governance, Roles & Responsibilities**

Assist in defining clear roles and responsibilities since multiple projects contribute, f.i. at:

Portfolio level:

- **Portfolio communication lead**
 - Custodian of strategy and coherence
 - Oversees BMZ visibility compliance
- **M&E team**
 - Provides data, ensures accuracy of reported results

Secures compliance with GIZ data privacy and protection regulations as well as harmonization with GIZ sectoral data standards if applicable

Project level:

- **Communications focal points**
 - Provide content, stories, data
- **Project managers**
 - Approve project-specific outputs
 - Ensure alignment with donor requirements

BMZ & partners:

- Involvement in reviewing high-visibility products
- Ensure political alignment

vi. Processes & Standards

Assist with identification and provide recommendations to standardise:

- Approval workflows (BMZ/GIZ rules for visibility, review cycles)
- Content collection timelines (aligned to M&E reporting cycles)
- Quality standards (fact-checking, beneficiary protection, do-no-harm principles)
- Branding and identity (GIZ corporate design, BMZ visibility rules)
- Language and accessibility standards
- Information and Communication Technology (ICT) applications (software applications and standards for web applications, social media, data analysis tools etc.) to support the above

vii. Risk Management

Identify communication risks and mitigation measures (f.i. internal sign-off mechanisms to ensure quality control) regarding:

- Political sensitivities
- Attribution risks (who claims results?)
- Confidentiality of partner information
- Unrealistic expectations or overselling
- Misalignment with donor narratives
- Social media misinterpretation

viii. Monitoring, Learning & Adaptation

Support defining how communication effectiveness will be tracked:

- Engagement metrics (views, downloads, participation)
- Reach among key target groups
- BMZ feedback
- Partner satisfaction
- Accuracy and consistency of messaging
- Evidence that communication contributes to policy dialogue or scaling

These metrics should be aligned with the M&E framework (see section below).

Linkage between external communication strategy and the portfolio/project's M&E frameworks

The purpose of the linkage is to ensure that all external communication is evidence-based, consistent with BMZ/GIZ standards, and that the M&E system supports credible storytelling, donor visibility, policy influence, and learning across projects.

The contractor will help define:

What communication receives from M&E (inputs), e.g.:

- **Types of verified data & results, such as**
 - Portfolio indicators (outputs/outcomes)
 - Project-level results aligned with BMZ requirements
 - Dashboards, scorecards, data visualizations
- **Qualitative evidence**
 - Case studies, evaluation findings
 - Beneficiary stories (validated)
 - Lessons from monitoring missions, reviews
- **Risk & change signals**
 - Context changes
 - Implementation risks
 - Adaptive management decisions

What M&E receives from communication (feedback & use)

- **Evidence uptake & use**
 - Which results were communicated to BMZ, to partners, to the public
 - How evidence influenced partner dialogue or donor engagement
 - Degree of alignment between data and messages
- **Data quality feedback**
 - Gaps revealed during content creation (missing data, inconsistencies)
 - Validation checks through fact-checking of communication materials
- **Stakeholder feedback**
 - Reactions from partners, audiences, beneficiaries
 - Insights from events, conferences, social media interactions
 - Signals of what evidence is most meaningful externally

Key indicators **for a successful linkage** include:

- Communication products are evidence-based and timely.
- M&E data quality improves due to communication-driven validation.
- Portfolio messaging is consistent across projects.
- BMZ reports and visibility outputs align with actual results.
- Stakeholders (partners, donors) use portfolio evidence for decisions.
- Learning loops improve both systems over time.

1.4 The internal communication strategy and links to the M&E framework

The external communication strategy will be complemented with a practical framework for an **internal communication strategy** suited for a **portfolio of linked but independent BMZ-funded projects**. This takes into account a setup where multiple projects partly share goals, stakeholders, or themes but operate autonomously (different partners, teams, timelines). Similar to the external strategy, the internal will address key elements, such as but not limited to:

- Objectives & purpose
- Stakeholder map
- Communication principles
- Key messages & narrative alignment
- Tools and channels architecture
- Roles & responsibilities
- Information and reporting flows
- Templates & standards
- Communication & meeting calendar
- Risk-communication protocol
- Learning and knowledge-sharing mechanisms
- Monitoring the communication system
- Change-management plan

Again, the purpose of linking communications and M&E is to ensure that communication **supports evidence generation, improves decision-making, and creates alignment** across projects; and that M&E provides the **data, insights, and signals** that drive communication flows within the portfolio. The internal strategy will outline – specific to the portfolio and the individual projects:

Milestones for work package 1	Delivery date/period
Individual kick-off meetings with communication focal points and relevant representatives: clarification of assignment - presentation of material - clarification of questions	Within 1 month after start of the contract
Research period: Review of materials – desk-based research - evaluation - development of recommendations	Within 3 months after start of the contract
Evaluation report, proposed changes in the form of a PowerPoint presentation and final strategy	Within 3 months after start of the contract
Agreed integrated Communication Strategy linked to M&E	Within 5 months after start of the contract
Support for the implementation of the recommendations	Upon request
Follow-up advice	Upon request

Direct contact person for the contractor to coordinate the services will be a GlZ designated Communications Focal Point, based in St. Lucia.

Work package 2: Development and implementation of communication activities and products

GIZ Caribbean is an important partner to the Caribbean Community (CARICOM) and more specifically, the CARICOM Secretariat. GIZ supports the achievement of the Secretariat's 2030 strategy and the implementation of sustainable development plans in CARICOM member states. However, despite substantial political progress, citizens and stakeholders tend to have low awareness about the work and the impacts. The purpose of this work package is to improve the communication about the new GIZ Caribbean projects and their demonstrable impact on beneficiaries. It achieves this by augmenting the capacity of the internal communication team through the outsourcing of specialised, operational tasks on an as-needed basis. This action will accelerate the effective dissemination of high-quality project results, providing the internal team with the necessary flexible capacity to scale efforts rapidly while focusing on strategic priorities.

Under this contract, expertise in public opinion, outreach, public relations, information technology, web and graphic design, video production, audio-visual communications and social media, among others, will be required. The contractor will work closely with GIZ Caribbean projects and their partners including commissioning parties.

- The contractor will ensure that all experts assigned are aware of the relevant communications and visibility guidelines by the German Cooperation (GIZ/BMZ) and other relevant partners, e.g. CARICOM, and other commissioning parties, e.g. the European Union (EU). They are all available in the Corporate Design Center: <https://www.giz.de/cdc/en/>
- Throughout the duration of the contract, the contractor will support the implementation of this strategy in a manner which enables GIZ Caribbean communicators to gradually apply selected formats independently and to mainstream selected formats into communications activities.
- The contractor will assess the capacity of partner communication systems, including those of CARICOM, to be used for project-related communication and shall make use of these systems where they are assessed as suitable.
- The contractor will, in cooperation with GIZ Caribbean, develop and implement various communication activities. The tasks include, but are not limited to:
 - **Proofreading, editing, copywriting:** Proofreading, editing, copywriting for the creation of texts for different channels, target groups and formats. This includes research and coordination with relevant staff and partners.
 - **Content and content strategy:** Provide support and advice on user research, User Experience (UX), information architecture, content strategy, usability and accessibility. Using a variety of appropriate formats, including editorial contributions such as articles for newsletters and internal platforms, Op-eds, interviews, comments, reports and curated messages. In addition, for each of the six GIZ Caribbean projects, there need to be at least two success and beneficiary stories and impact/result data developed each year.
 - **Social media:** Support the GIZ communications officers in the community management for social media channels (Instagram, LinkedIn, etc.), including development and curation of hashtags, adaptation from website and other existing content for social media as well as content and templates designed specifically for social media and specific campaigns on (e.g. CARICOM Energy week, International Biodiversity Day, International Skills Day, Earth Day, Coastal Clean-Up Day etc. Interaction with followers (commenting, sharing, initiating polls, etc.). This also includes providing support and advice on swift and effective rebuttal of incorrect or

misleading information that may harm the perception or reputation of GIZ Caribbean or German Development Cooperation and CARICOM. Support to tracking and presenting analytics reports associated with community management and campaigns, identifying search engine marketing opportunities based on competitive research, industry data and trends, key performance metrics. For every campaign, best Key Performance Indicators (KPI) shall be identified and the most effective channels for monitoring and assessment shall be established. For each of the new GIZ Caribbean projects, there should be developed at least two posts per months.

- **Web-Design:** Creation, adaptation and development of layout and design for existing webpages and portals as well as adaptation of online content for social media formats. Development of user interface design, usability, visual design, UX, visual identification, Search Engine Optimisation (SEO), and marketing.
- **Graphic Design:** Creation of (interactive) graphics and animations for use on multiple media, for various purposes and target groups, including title and post-production work, visual drafts and story boards, data visualization, data storytelling. This includes at least one infographic with impact/result data for each GIZ Caribbean project per year.
- **Audio-visuals and animated videos of success stories and/or key events:** Production of 3 short and one long-form video for each project to capture and bring awareness to GIZ Caribbean through the successful aspects of the 6 projects (videos must include interviews, actualities, subtitles and narration, as needed)
- **Photography:** The contractor will provide different photography services (through deploying professional photographers) to capture selected events, project activities, topical situations to be used for online and printed media formats. This will be complementing GIZ's photo pool and will require the contractor and the photographer to comply with applicable data protection regulations wherever persons are photographed, specifically for the photographer to secure required consent forms from individuals featuring on the photos on occasions where GIZ has not already secured such consent (as will be the case for online or in person events organised by GIZ). For licence terms and conditions for such photos please refer to the General Terms and Conditions of contract.
- **Branded material:** Design, layout, production and dissemination of branded communication material, including electronic and printed logos, letter heads, etc.
- **Promotional material:** publications of various online and offline formats and length (factsheets updated twice a year for each of the new GIZ Caribbean projects, PowerPoint presentations, brochures, briefing papers, publications, banners), visuals and audio-visuals and appropriate merchandise
- **Outreach:** Based on request, provide support and advice for targeted outreach events of GIZ Caribbean and its relevant partners at regional (CARICOM) or national levels.
- **Events and conferences:** Communication support to selected events, including classic Public Relations, provision of moderation services, the development and implementation of suitable blended/virtual formats to enable interactive participation, support in drafting reports on stakeholder and participant input including lessons learnt and recommendations for follow-up.
- **Collaboration with media outlets:** Support in development of collaborative media/public awareness campaigns that call for action(s) related to at least 3 Projects
- **Liaising** with other service providers and consultants (i.e. web design, printing).

Process for specification, approval and monitoring of above services: Each task is introduced with a briefing by GIZ Eastern Caribbean for the contractor. In this briefing, GIZ

Eastern Caribbean explains the scope and expected results of the task in written form. The Team Leader and/or the Expert then clarifies open questions and provides a budget/expert days estimate to solve the task and secures approval from the responsible GIZ staff in charge of the brief. The Team Leader monitors the use of the budget/remaining budget and ensures that the total number of expert days provided for in the contract is not exceeded.

In consultation with the GIZ representatives for this contract, the contractor will develop and propose a unified format and process description for request, approval and monitoring of resources to be used across all six projects for the different types of envisaged communication formats and outputs.

Milestones for work package 2	Delivery date/period
Agreed unified format and process description for request and approval of specific services.	Within 2 weeks after start of the contract. The expert days and deadline per assignment will be discussed with the Team Leader/Expert during the initial briefing and will depend on the scope of the task.
Implementation	Starting after approved standard request approval process. The expert days and deadlines per assignment will be discussed with the Team Leader during the initial briefing and will depend on the scope of the task.
Feedback and adjustments	Detailed report on a quarterly basis on resources used per type of service and project, and projection for the following three months.

Work package 3: Develop a Monitoring and Evaluation framework across the six projects

GIZ is implementing the above-mentioned portfolio of six independent but thematically linked BMZ-funded projects in the Eastern Caribbean. The projects contribute to regional development priorities of CARICOM relating to climate resilience, environmental sustainability, and inclusive economic transformation. While each project has its own results framework, and implementation modalities, the portfolio seeks to generate **coherent reporting, aggregated results, synergies**, and **shared learning** across the region.

To strengthen the portfolio's results-based management system and ensure evidence-based communication and decision-making, the contractor will deploy a **Monitoring & Evaluation (M&E) key expert** supported by various team members to develop, coordinate, and operationalise a harmonised, results-oriented M&E framework across all six projects. The tasks under this work package include, but are not limited to:

Review the current scope and status of the portfolio M&E system(s)

- Clarify through workshop(s) and bilateral discussions with project managers and the project teams M&E responsible persons whether an integrated M&E framework across the six projects is needed and what elements it could address (e.g., aggregation, learning, synergies, aggregate reporting).
- Propose an approach for adoption by the GIZ project managers of the six projects.

Map M&E requirements across all six projects

- Identify objectives, indicators, target groups, regions, implementation status.

- Review GIZ sectoral data standards for harmonisation of monitoring data if applicable
- Review BMZ proposals, results matrices/results models, indicators, and other relevant existing commitments.

Stakeholder engagement

- Identify BMZ / GIZ project counterparts, partner ministries, regional institutions, GIZ country teams M&E responsible persons.
- Conduct consultations to understand expectations and reporting needs.

Analyse possible synergies and interfaces between the results matrices, results models

- Review each project's results chain / results model and results matrices, and, where applicable, provide input to the results model updating processes conducted by project teams.
- Review GIZ standard indicators, GIZ quality criteria, GIZ markers, and cross-cutting topics
- Identify similarities, overlaps, and thematic clusters across projects (e.g., TVET/Skills Development, digitalization, gender, climate resilience), including context-specific or conflict sensitive topics, and propose portfolio-wide indicators along with the data needed to measure them.
- Review and where needed, support the development of a portfolio-level and project-level Theories of Change (3-5 page narrative each with visualisation – using the GIZ results model / *Wirkungsmodell*)
- Graphic visualisation of how the six projects collectively contribute to overarching outcomes and impact at regional level.

Build an Indicator Framework for the portfolio of the six projects

- Create a portfolio indicator architecture
- Catalogue existing project indicators and definitions provided by the projects
- Link and propose harmonisation of indicator definitions where feasible in close collaboration with the project teams M&E responsible persons
- Propose common measurement metrics, units, methodologies, if applicable changes to definitions developed by the project teams, and disaggregation levels.
- Recommend required baseline studies and assist with specifications tailored to each project's objectives and indicators (provide technical input to ToR for sub-contracting baseline study implementation where required)
- Link and where possible suggest alignment of measurement frequency and data sources across projects.

Review and propose data systems and tools

- Review existing data collection processes conducted by the project teams
- Review data collection and analysis tools designed by the projects
- Develop a roles and responsibilities framework for M&E functions (linked to the communications strategy work package above) - who collects what, how often, and with what tools.

Support the development or adaptation of digital tools

- Review existing partner system (regional M&E dashboards or similar) and propose linkages with GIZ M&E requirements
- Propose an approach to use of digital support tools (where required with specifications for new tools) and/or shared databases (e.g., Excel, GIZ digital tools) and document repositories (e.g. GIZ Data Management System, MSTeams) in compliance with GIZ's data and tool policy
- Develop a portfolio-dashboard for results reporting meaningfully displaying portfolio-wide indicator achievements

Establish reporting and learning mechanisms

- Review portfolio-level reporting requirements and timeframes / cycles
- Review and document roles and responsibilities of involved GIZ staff and external support
- Review and collate formats for reporting,
- Integrate communication and M&E plans
- Throughout the process: conduct validation workshops with concerned staff / management
- Finalise and document the results-based M&E framework
- Support capacity development of GIZ and partner staff where required

Validation and Finalization

Milestones for work package 3	Delivery date/period
Participate in the Kick-Off Workshop	Upon start of the contract
Draft M&E systems review report and presentation (validation workshop)	Within 3 months of the start of the contract (linked to the communication strategy under WP1)
Agreed M&E framework documentation	Within 5 months of the start of the contract (linked to the communication strategy under WP1)
Technical support and Capacity Development linked to the operationalisation of the M&E framework	As per need upon adoption of the proposed M&E framework document

Work package 4: Monitoring and evaluation of communication activities

This work package aims to optimise and manage existing and future digital communication activities and channels (developed under work package 2) with a view to have better alignment between the various formats GIZ Eastern Caribbean programmes and projects are using. The tasks include, but are not limited to:

- The contractor will define quality criteria (KPI) for outputs that will be broadly applicable to various themes, formats or channels, to be selected by GIZ Eastern Caribbean, for which services will be required under this contract. KPI shall be both quantitative and qualitative, where applicable (e.g. various indicators for reach, engagement rate, sentiment analyses, surveys). The KPI shall serve monitoring purposes for both GIZ Eastern Caribbean programmes and projects, shall be monitored regularly throughout the duration of the contract, and shall serve evaluation purposes at the end of the contract.
- Continuous performance analysis and optimization of all media channels including mass media coverage and social media metrics.
- Conduct regular feedback from stakeholders to determine success of communication efforts and changes needed
- Reporting on qualitative and quantitative communication objectives as defined in the Communications Strategies under working package 1.

Milestones for work package 4	Delivery date/period
Reporting and performance analysis of communication activities	Generally, on a quarterly basis, for pre-defined and high-level events within a week after the event

Work package 5: Capacity development on communication and M&E

In order to integrate the formats developed under work package 2 and 3 into GIZ Eastern Caribbean's communications and M&E routine and to ensure effective mainstreaming, the contractor shall develop suitable capacity building methods. Capacity building is to be provided for selected communicators and M&E personnel from GIZ Eastern Caribbean as well as other relevant staff and representatives from commissioning parties and partners:

- Upon clarification of priorities for capacity building (Capacity Development Needs Assessment) on behalf GIZ Eastern Caribbean, and upon available skills and capacities, the contractor will develop a suitable range of training curricula which shall consist of theoretical elements, practical training of acquired knowledge and techniques as well as a feedback element to build upon and enhance the annual trainings for GIZ Eastern Caribbean communicators and M&E related staff.
- Capacity building shall be organised in trainings/workshops. The trainings/workshops shall - where most suitable - be organized virtually but it also may involve travelling and conducting trainings/workshops in person in the country where most staff of GIZ Eastern Caribbean are based in (Dominican Republic or St Lucia).
- The contractor will, in cooperation with GIZ Eastern Caribbean, identify suitable communication/M&E activities or events which allow newly acquired techniques to be implemented by GIZ Eastern Caribbean communicators or M&E staff.
- The contractor shall develop and/or organise suitable learning material as a follow-up after each training as well as develop a self-analysis template for participants to track individual learning progress and identify potential need for continued training. The

contractor shall make the developed material available to GIZ Eastern Caribbean for further perusal.

- For monitoring purposes, the contractor shall document the overall learning progress. Specifically, the feedback element shall monitor how the GIZ Eastern Caribbean staff apply their newly acquired knowledge of digital issues to their work, using a variety of formats. Where applicable, the feedback element shall demonstrate how the capacity building measures contribute to the initially identified KPI.
- Existing GIZ digital learning architecture / applications (such as ATINGI) shall be considered in the process of designing CD interventions.

Milestones for work package 5	Delivery date/period
Capacity Development needs assessment	Within 3 months of start of the contract (linked to WP1 and 3)
Training plan and curriculum proposed, according to priorities to be defined GIZ Eastern Caribbean	Within 4 months upon start of the contract.
Trainings/workshops held (according to the agreed upon capacity development plan)	Starting 5 months after start of the contract
Training/workshop materials are available for self-learning and further distribution as well as self-analysis templates	Delivered 1 week after each training
GIZ Eastern Caribbean communicators, M&E staff and (partner) staff confirm the application of newly acquired knowledge to their work	Time to be defined with GIZ Eastern Caribbean

What communication inputs to M&E

Communication Element	Contribution to M&E Framework
Portfolio key messages & shared narrative	Clarifies common outcomes and indicators; supports harmonization of theories of change.
Standard templates (reports, dashboards, briefs)	Ensures consistent data capture and comparability across projects.
Information flows & escalation protocols	Enables timely submission of M&E data, risk updates, and performance insights.
Technical working groups / Communities of Practice	Generate qualitative data, learning, and evidence to feed into M&E learning loops.

What M&E inputs to communication

M&E Component	How It Drives Communication
Indicators & results data	Populate internal updates, dashboards, portfolio messages, and donor communications.
Evaluation findings & learning reviews	Shape key internal messages, training needs, best-practice guidance, and portfolio narrative.
Risk assessments & performance monitoring	Trigger targeted communication (escalations, coordination actions, corrective measures).

M&E Component	How It Drives Communication
Outcome harvesting / qualitative insights	Provide stories, evidence, and internal learning content.

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 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.

Monitoring and reporting requirements:

- The contractor plays an active role in the results-based monitoring of the project. Regular monitoring activities have been specified in the different Work Packages above.

The contractor reports to GIZ as follows:

Instead of the reporting language stipulated in GIZ's General Terms and Conditions of Contract (GTC) (German), the contractor provides the following reports in the following language: English.

- **Inception Report** within a week of the first quarterly payment period stipulated in the contract. The Inception Report will not exceed 20 pages (excluding Annexes) and will cover progress reports against all Work Packages and highlight possible deviations from the initial work plan as well as areas requiring adaptation. The report will provide in tabular form an overview of resources used (person days) during the period per category of expert as well as a tentative plan for resources planned to be used in the following quarter.
- **Quarterly Interim Report(s)** within a week of the quarterly payment period stipulated in the contract.
- **Final Report** one month prior to the end of the contract term.

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.

Requirements for company-wide learning, knowledge and innovation:

- The contractor provides support in implementing a project evaluation with special emphasis on ensuring the effectiveness of the knowledge management process.
- Submission (in a single package) of the materials developed and interim and final reports to the GIZ Eastern Caribbean Country Office, including any monitoring data collected in a harmonized and cleaned format for integration into GIZ IT systems (e.g., xlsx or csv-format).
- 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 1.10 Data protection) apply.

Personal data will be processed on behalf of the client. Therefore, an agreement on "Outsourcing of data processing (AuV)" will be concluded with the contractor in accordance with Art. 28 GDPR. For this purpose, the technical and organisational measures (TOM) for compliance with the data protection requirements must be outlined prior to conclusion of the contract. If the contractor has already been audited by GIZ in the past, an update in accordance with GDPR must nevertheless be sent. After a positive check, the contract is concluded with the AuV attachment.

2.5 Other requirements

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

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 GIZ and 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 activities or actors, process adjustments, etc.

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

– Not applicable –

This will be part of the implementation of the contract under Work Package 1.

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 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 describe the strategic approach to the tasks formulated in section 2.

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)

– Not applicable –

3.3.4 Consideration of environmental and social compatibility requirements (section 1.3.4 of the assessment grid)

– Not applicable –

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, 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 / with the commissioning projects.

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)

- The tenderer is required to explain and, as far as possible, provide specific evidence of **in-house expert** resources relevant to the tasks of this contract (over and above the experts proposed in with CV in the tender) available and to the tenderer, f.i by presenting a tabular overview of in-house expertise matching the profiles required for the pool of short-term experts.
- The tenderer is required to describe its **backstopping strategy**. A CV must be provided for the positions for technical and administrative backstopping.

Requirement: Available in-house expertise: 7 points out 10 (max.)

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

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.

Expert 1: Team leader – Expert on Communication Strategy with international experience

(section 2.1 of the assessment grid)

This position is a key expert.

Tasks of expert 1: (Team leader)

- Overall responsibility for the advisory packages of the contractor
- Ensuring the coherence and complementarity of the contractor's services with other services delivered by the project at local, national and regional level
- Act as single point of entry for GIZ for any services to be provided by experts from the pool of experts; responsible for preparing and securing GIZ approval for the to be agreed upon requests for and definition of those services.
- Design, implementation, monitoring and evaluation of capacity development measures for GIZ staff and local partners in the following areas: Communication and Monitoring, Evaluation and Learning

- 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 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 commission manager at GIZ
- Supporting the commission managers in updating and/or adapting the project strategy, in evaluations and in preparing a follow-on phase.

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 Communications, Journalism, Public Relations, Development Studies, Political Science, Marketing, or a sector-relevant field
Language (section 2.1.2 of the assessment grid):	Knowledge of English, C2-level in the Common European Framework of Reference for Languages (7 out of 10 points) Knowledge of German, C1-level in the Common European Framework of Reference for Languages (2 out of 10 points) Knowledge of Spanish, B2-level in the Common European Framework of Reference for Languages (1 out of 10 points)
General professional experience (section 2.1.3 of the assessment grid):	15 years of professional experience in either or a combination of the following fields: strategic communications, public information, media relations, digital communications, and/or public affairs (8 out of 10 points, based on number of years) 5 years of professional experience in coordinating communication activities at executive Government and/or management level in multi-stakeholder environments (2 out of 10 points, based on the number of years)
Specific professional experience (section 2.1.4 of the assessment grid):	5 years of professional experience in either or a combination of the following fields: developing and implementing communication strategies, visibility plans, and content strategies within international cooperation (for multilateral or bilateral donor funded projects). (7 out of 10 points, based on number of years) 2 years of professional experience linking communication and Monitoring & Evaluation within international cooperation (for multilateral or bilateral donor funded projects). (2 out of 10 points, based on number of years) 2 years of professional experience producing and supervising communication products (print, digital, audiovisual, social media, web content, data visualization) within international cooperation (for multi-lateral or bilateral donor funded projects). (1 out of 10 points, based on number of years)
Leadership/management experience (section 2.1.5 of the assessment grid):	5 years of combined management experience with disciplinary leadership responsibility for 5 staff members in projects, companies, and/or organisations. (6 out of 10 points, based on number of years) 5 years of management experience with communications budget responsibility (annual budget of EUR 100.000 equivalent). (4 out of 10 points)
International professional experience outside the region of	1 year of professional experience in one country outside the Latin America and the Caribbean region.

assignment (section 2.1.6 of the assessment grid):	
Professional experience in the region of assignment (2.1.7 of the assessment grid):	5 years of professional experience in Latin America and the Caribbean region (8 out of 10 points), of which 1 year in the Eastern Caribbean (OECS) region (2 out of 10 points)
Experience in the field of development cooperation (section 2.1.8 of the assessment grid):	5 years of experience in development cooperation projects
Other (section 2.1.9 of the assessment grid):	- digital content management, social media strategy and analytics tools (4 out of 10 points, if experience in either or combination of these fields amounts to 1 year) - web design, User Experience/Interface (UX/UI), information architecture, and Search Engine Optimisation (SEO)-related communication tasks (3 out of 10 points, if experience in either or combination of these fields amounts to 1 year) - storytelling for development, data visualization, audiovisual supervision, workshop facilitation, and capacity development (3 out of 10 points if experience in either or combination of these fields amounts to 1 year)

Expert 2: Key Expert – Monitoring and Evaluation Expert with international experience (section 2.2 of the assessment grid)

This position is a key expert.

Tasks of expert 2 – Monitoring & Evaluation Expert

- Review the current scope and status of the portfolio M&E system(s)
- Map M&E requirements across all six projects
- Stakeholder engagement
- Analyse possible synergies and interfaces between the results matrices
- Review and propose data systems and tools
- Support the development or adaptation of digital tools
- Review surveys designed through project teams
- Establish reporting and learning mechanisms
- Validation and Finalization
- Design and provide capacity development interventions on M&E

Qualifications of expert 2.

Education/training (section 2.2.1 of the assessment grid):	University degree (e.g. 'master's or German Diplom') in Social or Political Sciences or another related discipline relevant to or with specialisation in monitoring and evaluation.
Language (section 2.2.2 of the assessment grid):	Knowledge of English, C1-level in the Common European Framework of Reference for Languages (6 out of 10 points) Knowledge of German, C1-level in the Common European Framework of Reference for Languages (4 out of 10 points)
General professional experience (section 2.2.3 of the assessment grid):	15 years of professional experience of monitoring and evaluation in development cooperation context.

Specific professional experience (section 2.2.4 of the assessment grid):	10 years of experience in designing and implementing M&E frameworks, conducting evaluations, applying quantitative and qualitative research methods in development cooperation projects (7 out of 10 points) with specific experience in either or combination of the following sectors (3 out of 10 points): Nature Conservation, Biodiversity Protection, Marine Protected Areas, Employment Promotion and Skills Development, Sustainable Economic Development. (points will be awarded based on total number of years of relevant experience)
Leadership/management experience (section 2.2.5 of the assessment grid):	5 years of management experience in leading M&E assignments (developing, and/or implementing M&E frameworks, conducting monitoring and/or evaluation missions, and/or applying quantitative and qualitative research methods) with teams of experts and/or in mixed teams with counterparts from development cooperation project or partner organisations. (points will be awarded based on total number of years of relevant experience)
International professional experience outside the region of assignment (section 2.2.6 of the assessment grid):	1 year of professional experience in one country outside the Latin America and the Caribbean region
Professional experience in the region of assignment (2.2.7 of the assessment grid):	5 years of professional experience in Latin America and the Caribbean region (8 out of 10 points), of which 1 year in the Eastern Caribbean (OECS) region (2 out of 10 points)
Experience in the field of development cooperation (section 2.2.8 of the assessment grid):	5 years of experience in development cooperation projects
Other (section 2.2.9 of the assessment grid):	1 year professional experience with developing results-based M&E frameworks for BMZ/GIZ projects.

Expert 3: Pool 1 ‘Senior Expert Pool’ with 6 experts

(section 2.3 of the assessment grid)

A CV for each expert must be added to the tender.

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 1

- Editing, proofing, drafting of texts for different communication and reporting needs and a range of target audiences.
- Photography and videography of events, specific topical documentations for different communication and reporting needs and a range of target audiences.
- Web, social media communication and analytics for different communication and reporting needs and a range of target audiences, designing and conducting online, hybrid and in-person training sessions for GIZ and/or counterpart staff.
- Graphic design and layout services for a range of printing and publishing needs (electronic and printed)
- Lead facilitation of high-level, multi-stakeholder workshops in online, hybrid and in-person settings.

- Designing and conducting as lead expert baseline and impact evaluation studies, designing and conducting online, hybrid and in-person capacity development training sessions on monitoring and evaluation for GIZ and/or counterpart staff.

Qualifications of the expert pool 1

Education/training (section 2.3.1 of the assessment grid):	2 of 6 experts with a university degree (e.g. 'master's or German Diplom') in Communications, Digital Media, Marketing, Journalism, Public Relations, Data Science or a sector-relevant field (3 out of 10 points, full points for an exact match for each of the two experts, 2 out of 10 points for any other sector-relevant fields for both experts). 4 out of 6 experts with a university degree (e.g. 'master's or German Diplom') in Social Sciences, Organizational Development, Adult Education, Communications, Political Science, Development Studies, Monitoring & Evaluation, Economics, Statistics, Data Science or related field (7 out of 10 points, full points for an exact match with any of the fields listed above for all 4 experts; 5 out of 10 points for any other sector-relevant fields for all 4 experts).
Language (section 2.3.2 of the assessment grid):	6 of 6 experts with knowledge of English, C2-level in the Common European Framework of Reference for Languages (7 out of 10 points). 1 of 6 experts with knowledge of Spanish, C2-level in the Common European Framework of Reference for Languages (2 out of 10 points) 1 of 6 experts with knowledge of French, C2-level in the Common European Framework of Reference for Languages (1 out of 10 points)
General professional experience (section 2.3.3 of the assessment grid):	2 of 6 of experts with 10 years of professional experience in social media communication, digital communication, or online public relations, social media analytics (3 out of 10 points) 3 out of 6 experts with 10 years of professional experience in monitoring and evaluation, including results-based management and data collection systems, including application of quantitative and qualitative research methods. (4 out of 10 points) 2 out of 6 experts with 10 years of professional experience in moderating workshops, stakeholder consultations, or multi-partner meetings; designing participatory processes, dialogue formats, or capacity-building sessions. (3 out of 10 points)
Specific professional experience (section 2.3.4 of the assessment grid):	2 of 6 of experts with 5 years of professional experience each in social media strategy development and implementation for donor-funded projects, incl. social media analytics (engagement metrics, dashboards, platform insights, KPI development, reporting) and producing digital content (graphics, short videos, reels, animations, infographics). (3 out of 10 points) 3 of 6 of experts with 5 years of professional experience each in designing and leading baseline studies for development cooperation projects, including developing data collection instruments (surveys, interview guides, sampling frameworks) and conducting field research, supervising enumerators, performing data analysis, and preparing baseline reports. (4 out of 10 points) 2 of 6 of experts with 5 years of professional experience in virtual facilitating workshops for donor-funded or international cooperation projects, using digital facilitation tools and methods (virtual workshops, hybrid events, collaborative platforms). (3 out of 10 points)
Leadership / management experience (section 2.3.5 of the assessment grid):	2 of 6 experts with 8 years of management experience managing communication teams and/or service providers with budgets of EUR 100.000 per annum for communication and/or digital outreach activities in projects, companies and/or other organisations. (3 out of 10 points)

	2 of 6 experts with 8 years of leadership experience for facilitation teams or thematic workstreams in planning, managing, quality-assuring large-scale workshops or multi-day events. (3 out of 10 points) 3 of 6 experts with 8 years of management experience managing teams involved in data collection, research, and/or M&E assignments, with EUR 50.000 research budgets and/or 8 years of experience in supervising external service providers or enumerators for projects with EUR 50,000 budgets. (4 out of 10 points)
International professional experience outside the region of assignment (section 2.3.6 of the assessment grid):	4 of 6 experts with 1 year of professional experience in one country outside the Latin America and the Caribbean region. (maximum of 10 points awarded in relation to cumulative years of experience of 4 experts)
Professional experience in the region of assignment (section 2.3.7 of the assessment grid):	6 of 6 experts 5 years of professional experience in Latin America and the Caribbean region. (maximum of 10 points awarded in relation to cumulative years of experience of 6 experts)
Experience in the field of development cooperation (section 2.3.8 of the assessment grid):	6 of 6 experts with 2 years of experience in development cooperation projects (maximum of 10 points awarded in relation to cumulative years of experience of up to 6 experts)
Other (section 2.3.9 of the assessment grid):	2 of 6 experts with 2 years of professional experience working with regional organisations (e.g. CARICOM, OECS). (4 out of 10 points) 2 of 6 experts with certificated experience (3 out of the following technical skills certified) in in social media scheduling, monitoring, and analytics tools (Meta Business Suite, LinkedIn Analytics, Hootsuite, Buffer, Sprout Social, Google Analytics), UX/UI fundamentals, digital accessibility, and content optimisation for mobile-first communication, digital storytelling, data visualization, community management, and online reputation management. (3 out of 10 points) 2 of 6 experts with demonstrated experience in design, facilitation, visualisation and documentation (of workshop results and producing actionable outputs) of participatory, interactive, and/or human-centred workshop methods (e.g., Liberating Structures, World Café, Open Space, Design Thinking) (2 out of 10 points) 2 out of 6 experts with demonstrated experience in virtual facilitation tools (Miro, Mural, Mentimeter, Zoom tools, Teams tools, Jamboard, etc.) .. (1 out of 10 points)

Expert 4: Pool 2 ‘Junior Expert Pool’ with 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 2

- Supporting editing, proofing, drafting of texts for different communication and reporting needs, photography and videography of events, specific topical documentations for different communication and reporting needs and a range of target audiences.
- Technical support to web, social media communication and analytics for different communication and reporting needs and a range of target audiences, designing and conducting online, hybrid and in-person training sessions for GIZ and/or counterpart staff.
- Technical support to graphic design and layout services for a range of printing and publishing needs (electronic and printed)
- Co-facilitation of high-level, multi-stakeholder workshops in online, hybrid and in-person settings.
- Supporting data collection and analyses, preparation and implementation of baseline and impact evaluation studies, development of survey instruments.

Qualifications of the expert pool 2

Education/training:	2 of 6 experts with a university degree (e.g. bachelor's degree) in Communications, Digital Media, Marketing, Journalism, Public Relations, Data Science, or a sector-relevant field. 4 out of 6 experts with a university degree (e.g. bachelor's degree) in Social Sciences, Organizational Development, Adult Education, Communications, Political Science, Development Studies, Monitoring & Evaluation, Economics, Statistics, Data Science or related field.
Language:	6 of 6 experts with knowledge of English, C2-level in the Common European Framework of Reference for Languages. 1 of 6 experts with knowledge of Spanish, C2-level in the Common European Framework of Reference for Languages 1 of 6 experts with knowledge of French, C2-level in the Common European Framework of Reference for Languages
General professional experience:	2 of 6 of experts with 3 years of professional experience in social media communication, digital communication, or online public relations, social media analytics 3 out of 6 experts with 3 years of professional experience in monitoring and evaluation, including results-based management and data collection systems, including application of quantitative and qualitative research methods. 2 out of 6 experts with 3 years of professional experience in in (co-) moderating workshops, stakeholder consultations, or multi-partner

	meetings; designing participatory processes, dialogue formats, or capacity-building sessions.
Specific professional experience:	2 of 6 of experts with 2 years of professional experience in supporting social media strategy development and implementation for donor-funded projects, incl. social media analytics (engagement metrics, dashboards, platform insights, KPI development, reporting) and producing digital content (graphics, short videos, reels, animations, infographics). 3 of 6 of experts with 2 years of professional experience in supporting data analyses, implementing baseline studies for development cooperation projects, including developing data collection instruments (surveys, interview guides, sampling frameworks) and conducting field research, as enumerators or performing data analysis, and contributing to research reports. 2 of 6 of experts with 2 years of professional experience in (co-) facilitating workshops for donor-funded or international cooperation projects, including using digital facilitation tools and methods (virtual workshops, hybrid events, collaborative platforms).
Leadership/management experience:	Not applicable
International professional experience outside the country/region of assignment:	Not applicable
Professional experience in the country/ region of assignment:	6 of 6 experts with 3 years of professional experience in the Caribbean region.
Experience in the field of development cooperation:	1 of 6 experts with 2 years of experience in development cooperation projects
Other:	Not applicable

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

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 Conditions, section 3.6.2)
Expert 1: Team Leader	75	15	90	No
Expert 2: KE M&E	60	20	80	No
Expert 3: STE Pool Senior	100	50	150	No
Expert 4: STE Pool Junior	200	-	200	No
Backstopping	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 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

Travel expense budget: **EUR 60,166.25**

Budget for CO₂ offsets for flights: **EUR 2,975.00**

An unalterable budget for CO₂ offsets for settlement against evidence is specified.

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

- Per-diem allowances and accommodation allowances
- Flights and other transfer costs
- Budget for CO₂ offsets for flights:
- Ancillary travel expenses (visa acquisition costs etc.)

The per diem costs are reimbursed as a lump sum (per-diem allowances up to the maximum amounts permissible under tax law for each country) as set out in the country table in the circular from the German Federal Ministry of Finance on the reimbursement of travel expenses (see <https://www.bundesfinanzministerium.de>), or on presentation of evidence (airfares and other main transport costs).

Notes on the settlement of accommodation allowances outside Germany:

- 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**.

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

GIZ provides the operating infrastructure and local transport where required. The experts while on mission in the Caribbean will work at GIZ office in St. Lucia.

– Not applicable –

5.6 Workshops, education and training

– Not applicable –

The contractor is not responsible for the logistical organisation of the workshops and therefore the costs do not need to be specified.

5.7 Local contributions

– Not applicable –

5.8 Other costs

– Not applicable –

5.9 Flexible remuneration item

Budget for flexible remuneration: **EUR 40,000.00**

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 30 pages (not including the cover page, list of abbreviations, table of contents, brief introduction and CV for the backstopper). Additional annexes not requested will not be assessed. 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 should 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)

- 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)
- 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)

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.

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

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

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

Scope of possible services:

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

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

A follow-on contract under 7.2 can be considered only as an alternative to the option in 7.1.

8. Annexes

- Annex 1: Summary Fact Sheets of the six concerned projects
- Annex 2: List of Standard Indicators (for 5 of the six projects)