

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

CONFIDENTIAL

Capacity building on Access to Finance to EDIh/DIH relevant partners	Project number/ cost centre: G-012362-004 Tender number 10045215
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0. List of abbreviations

AG	Commissioning party
AN	Contractor
AVB	General Terms and Conditions of Contract for supplying services and work
FK	Expert
FKT	Expert days
KZFK	Short-term expert
ToRs	Terms of reference

1. Context

Brief information on the project

The EU4Digital - An accelerated digital transition for the Western Balkans - Phase 1 project (hereafter EU4Digital WB6 or the project), co-funded by the European Union and the German Federal Ministry for Economic Cooperation and Development (BMZ), aims to accelerate digital transformation across the six Western Balkan economies (WB6) by enhancing digital infrastructure, improving cross-border digital services, and supporting businesses in their digital transition. The project operates under three core pillars: digital infrastructure, e-governance and interoperability, and digital transformation for businesses. GIZ serves as the implementing partner, responsible for steering the project's activities across the six WB economies (Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, and Serbia). German Development Cooperation, represented by GIZ, leads coordination with local governments, ministries, and businesses, ensuring alignment with EU standards and facilitating regional cooperation. Additionally, GIZ EU4Digital WB6 manages the project's operational framework, stakeholder engagement, capacity-building measures, and technical support. The project's core components include:

1. Wi-Fi4WB: A public Wi-Fi initiative to install approximately 300 hotspots in underserved municipalities, enhancing digital accessibility,
2. Cross-Border Interoperability: Development of a regional pilot for interoperable e-services and mutual recognition of trust services, and alignment with the SDG regulation, preparing WB6 for future EU integration,
3. eFTI and Digital MSMEs: Support the introduction of an electronic Freight Transportation Information System (eFTI) in the Western Balkan economies, as well as support small and medium-sized enterprises (MSMEs) through the European Digital Innovation Hubs (EDIH), promoting the adoption of EU quality Standards in digital Transformation.

In Sub-pillar 3 (Digital MSMEs), the project is ultimately aimed at strengthening the competitiveness of MSMEs in WB6 economies with regards to digital transformation. Through better access to innovative technologies, skills and services across value chains, the project supports the creation of a conducive business environment for technological transformation of MSMEs in competitive sectors. This will result in an increased performance of companies, in particular for MSMEs, to become more competitive regarding their business/production processes, products and services by using digital technologies. Besides addressing the digital transformation needs of MSMEs, the project also involves actors at the macro level to improve the overall framework conditions for the promotion of innovations and digitalisation of MSMEs. As such, the project supports the development of a more beneficial operational framework for innovative business models, thus strengthening the countries capacities for collaborating on advanced technology solutions in the joint regional and EU projects, following the best EU practices, including support to setup and operations of European Digital Innovation Hubs.

European Digital Innovation Hubs (EDIHs) in WB6

Throughout 2023 to 2024 all economies in the WB6 became associated to the Digital Europe Programme (DEP).

Regarding EDIHs, the following are eligible for support under this tender*:

- Albania - Digital Valley Albania 1.0 (DiVa), Digital Innovation Unit (DIU), AI4DIGIT
- Bosnia and Herzegovina - eDIH Fusion X, and EDIH Onex
- Kosovo* - Digital Innovation Gateway for Kosovo,
- Montenegro – MONTEDIH,
- North Macedonia - INNOFEIT EDIH, DigitMak
- Serbia - Capital Innovation Point – Serbia, Serbian 4 EDIH on AI.

Access to finance represents one of the four core pillars of EDIH service delivery and is crucial for the effective implementation of advanced digital solutions, which often exceed the financial capacities of MSMEs. EU and venture capitals, investors, Financial Support to Third Parties (FSTP) are some of the potential opportunities for SMEs to get access to funding, as well as EDIHs and DIHs. There is a need to strengthen the capacities for the Hubs as disseminators and multipliers of information as well as it is crucial to building a community if A2F information, applications, solutions etc that is established in the WB6.

2. Tasks to be performed by the contractor

All services provided by the contractor will be based on EU and/or GIZ-project based practice.

During the implementation period, GIZ staff in the form of a Component Lead (based in Kosovo*), a Regional Advisor (based in North Macedonia) and a Technical Advisor for Private Sector Development (based in Germany), will complement the services where needed. The contractor will have regular coordination meetings with the project and ensure communication and approach to the partners with GIZ project support. Once regular communication channels are established and trust and cooperation are developed, the Contractor may undertake direct contact with partners, but always informing the project. Also, the contractor will align with the consulting company already engaged for supporting EDIH and NCP in capacity building, as well as coordination with RCC and other relevant donors. GIZ will provide all relevant contacts and information needed as preparatory for this task.

- The contractor is responsible for selecting, preparing, training and steering the international and national, short and long-term experts assigned to perform the advisory tasks,
- The contractor reports regularly to GIZ in accordance with the current AVB of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH.

All tasks will be / can be conducted in parallel. The contractor is expected to proactively identify opportunities to move the process forward efficiently and in cooperation with the partners. The contractor is responsible for providing the following services:

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- A. Conduct and review of current and planned A2F-related services of 11 WB6 EDIHs to ensure alignment and avoid duplication of efforts. Document and present best practice examples of A2F approaches from EU-based EDIHs, especially those relevant to the WB6 context, this could be shared with the group online.
(Proposed 5 days)

- B. Map and regularly update upcoming open calls of relevant EU programmes (e.g. Horizon Europe, Digital Europe, InvestEU, Erasmus+), applicable to WB6 EDIHs/DIHs and MSMEs. Share the calls on at least four webinars. (*proposed 10 days*)
- C. Deliver targeted coaching on relevant representatives from the WB ecosystem Access to finance actors (from EDIHs, relevant DIHs etc) on proposal development, consortia building, and project management. (Focus on funding lines such as Horizon Europe, Digital Europe Programme (DEP), Interreg, and other relevant opportunities.) One Workshop in-person (lasting 2 day). Share templates, checklists, and tips for competitive EU proposals and prepare follow up steps. (*proposed days 8 days*).
- D. Mentoring of more advanced and experienced applicants for the application process. Establish a peer review mechanism for experienced participants to receive structured, high-quality feedback and scoring simulations before submission. (*Proposed 6 days*)
- E. Developed proposed approach to attract investors. Increase visibility and attractiveness on a regional level for international investors. Organize Brokerage to facilitate matchmaking and codesign of project ideas and bring investors to WB relevant applicants. Event will be organized lasting 2 days. Organization of this event should take into consideration the activities and events that relevant donors have in the WB (RCC, EBRD, WBIF etc) (*Proposed 8 days*)
- F. Build WB6 EDIH/DIH capacities to assist WB6 MSMEs in exploring and exploiting EU funding opportunities (e.g. from Digital Europe, Horizon Europe, etc.) such as cascade funding (scale up) and Financial Support to Third Parties (FSTP), by delivering Workshop for WB6 EDIHs and DIHs on how to guide MSMEs in applying for cascade funding calls. (Workshop in person in WB region, lasting up to 2 days, including preparation and training materials). Assist WB6 EDIHs/DIHs with direct support to pilot MSMEs in applying cascade funding opportunities if needed. (*Proposed 8 days*)

In addition to the reports required by GIZ in accordance with the AVB, the contractor submits the following reports:

- Brief quarterly reports on the implementation progress status of the project summarizing the tasks (*max 10 pages including cover pages etc*),
- Final report summarizing the tasks performed and objectives achieved,
- Regular coordination calls with GIZ project (biweekly 30 min calls)

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

Milestones/process steps/partial services	Deadline/place/person responsible
A. Presentation of the A2F opportunities and the complementarity of the services as part of the service portfolio of the WB EDIH cycle.	September-November 2026
B. Research on open calls and at least delivered 3 webinars	September 2026-July 2027
C. Delivery of training on proposal development, consortia building, and project management for A2F relevant group.	October 2026-May 2027
D. High-quality feedback and scoring simulations before submission of at least 2 applicants	October 2026-July 2027
E. Organize Brokerage event to facilitate matchmaking and codesign of project ideas and bring investors to WB relevant applicants	December 2026-February 2027
F. Prepare and deliver Workshop on cascade funding and support at least 1 pilot applicant for cascade funding.	March-July 2027

Period of assignment: from **15.09.2026 until 31.07.2027**.

3. Concept

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

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

Technical-methodological concept

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

The tenderer is required to describe the key **processes (1.4)** for the services for which it is responsible and create an **operational plan** or schedule (1.4.1) that describes how the services according to Chapter 2 (Tasks to be performed by the contractor) are to be provided. In particular, the tenderer is required to describe the necessary work steps and, if applicable, take account of the milestones and **contributions** of other actors (partner contributions) in accordance with Chapter 2 (Tasks to be performed) (1.4.2).

Project management of the contractor (1.6)

The tenderer is required to explain its approach for coordination with the GIZ project. In particular, the project management requirements specified in Chapter 2 (Tasks to be performed by the contractor) must be explained in detail (1.6.1).

The tenderer is required to draw up a **personnel assignment plan** (1.6.2).with explanatory notes that lists all the experts proposed in the tender; the plan includes information on assignment dates (duration and expert days) and locations of the individual members of the team complete with the allocation of work steps as set out in the schedule.

4. Personnel concept

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

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

Team leader

Tasks of the team leader

- Overall responsibility for the advisory packages of the contractor (quality and deadlines)
- Coordinating and ensuring communication with GIZ, partners and others involved in the project
- Personnel management, **short-term expert pool** coordination, planning and steering of assignments and supporting overall project implementation
- Regular reporting in accordance with deadlines

Qualifications of the team leader

- Education/training (2.1.1): university degree (German ‘Diplom’/Master) in a relevant field (Economics, Business Administration or Social Sciences, IT, Engineering or other “STEM” studies),
- Language (2.1.2): C1-level language proficiency in English
- General professional experience (2.1.3): 10 years of professional experience in a position in business development, in digital innovation, or a related background
- Specific professional experience (2.1.4): 4 years of professional experience in a position related to either operating, working with or supporting European Digital Innovation Hub and Access to finance, Cascade funding and Financial Support to Third Parties (FSTP)
- Management/leadership (2.1.5): 3 years of professional experience managing innovation or digital transformation related team
- Regional experience (2.1.6): 3 projects in delivering Workshops on Access to finance, Cascade funding or FSTP in Western Balkan and Eastern Partnership region,
- Other (2.1.8): 8 million EUR funding attracted for the Western Balkan region due to services provided

Short-term expert pool comprised of with minimum 2, maximum 5 members

Tasks of the short-term expert pool

- Support the Team Leader in the tasks,
- Planning and implementation of the tasks
- Ensure regular information exchange and response on GIZ and all involved in the project actor's requests

Qualifications of the short-term expert pool

- Education/training (2.6.1): University degree (in a relevant field (Economics, Business Administration or Social Sciences (2.6.2), IT, Engineering or other "STEM" studies),
- Language: Excellent skills of written and spoken English (C1),
- General professional experience (2.6.3): 6 years of professional experience in a position in business development, in digital innovation, or a related background,
- Specific professional experience (2.6.4): 4 years professional experience in a relevant field related to the activities foreseen; technology transfer, digitalization, communication, experience in Digital Europe Programme/Horizon Europe or similar EU programmes and/or EDIH relevant experience mentioned above under Task description
- Regional experience (2.6.5): 1 project of working experience in Western Balkan on Access to finance, Cascade funding or FSTP.

Soft skills of team members

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

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

5. Costing requirements

Assignment of personnel and travel expenses

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

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

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

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

Sustainability aspects for travel

GIZ has undertaken an obligation to reduce greenhouse gas emissions (CO₂ emissions) caused by travel. When preparing your tender, please incorporate options for reducing emissions, such as selecting the lowest-emission booking class (economy) and using means of transport, airlines and flight routes with a higher CO₂ efficiency. For short distances, travel by train (second class) or e-mobility should be the preferred option.

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

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

Specification of inputs

Fee days	Number of experts	Number of days per expert	Total	Comments
Designation of TL/key expert/short-term expert pool	1	26	26	
Designation of short-term expert pool	2-5	19	19	
CO ₂ compensation for air travel	12	50EUR	600EUR	A fixed budget of EUR 600 is earmarked for settling carbon offsets against evidence .
Fixed travel budget	1	6.192EUR	6.192EUR	A budget is earmarked for travel to the following countries: WB6 (Albania, Bosnia and Herzegovina, Montenegro, North Macedonia, Kosovo and Serbia) and EU. A fixed budget of EUR 6.192 is earmarked for settling travel expenses against evidence. It is envisioned under this contract 3 in person events (2 Workshop/trainings and 1 Brokerage event) where 2 experts will travel 6 round flights)1 round flight per expert per travel)

				18 per-diems (3 per diems per expert per travel) 18 overnights (3 overnights per expert per travel) 12 transportations (airport transfer and transportation within country of assignment; 2 transports per expert per travel))
Other costs	Number	Price	Total	Comments
Flexible remuneration	1	4.089 EUR	4.089 EUR	A budget of EUR 4.089 is foreseen for flexible remuneration. Please incorporate this budget into the price schedule. Use of the flexible remuneration item requires prior written approval from GIZ. Against evidence

6. Requirements on the format of the tender

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

The complete tender must not exceed **10 pages** (excluding CVs). If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in

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

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