

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

CONFIDENTIAL

Project title:	Processing number/cost centre:
Energy Efficiency in India	G-018078-001
Country:	Internal order:
India	18078030000
Subject of the tender procedure:	Transaction number:
Providing Technical Assistance on Industrial Decarbonisation, CBAM Readiness, Gender Inclusion, Pilot and Upscaling	10030774

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0. List of abbreviations

ADEETIE	Assistance in Deploying Energy Efficient Technologies in Industries & Establishments
AV/DV	Audio Video/Digital Video
BEE	Bureau of Energy Efficiency
BMZ	German Federal Ministry for Economic Cooperation and Development
CAPEX	Capital expenditure
CBAM	Carbon Border Adjustment Mechanism
CO2	Greenhouse gas emissions
CV	Curriculum vitae
EA	Energy Auditor
ESG	Environmental, Social, Governance
GDPR	General Data Protection Regulation
GHG	Greenhouse Gas
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
GTC	General Terms and Conditions of Contract for supplying services and work on behalf of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
ICM	Indian Carbon Market
ISO	International Organization for Standardization
MSME	Micro, small and medium-sized enterprises
MoP	Ministry of Power
MRV	Monitoring, Reporting and Verification
NDCs	Nationally Determined Contributions
OPEX	Operating expense
PAT	Perform Achieve and Trade

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POSH	Prevention of Sexual Harassment
RMO	Risk Management Office
SASB	Sustainability Accounting Standards Board
SDAs	State Designated Agencies
SME	Small and medium enterprises
TCFD	Task Force on Climate-related Financial Disclosures
TRL	Technology readiness level
ToR	Terms of Reference
UN DESA	The United Nations Department of Economic and Social Affairs
USND	United Nations Statistics Division
WPA	Work Package A
WPB	Work Package B

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1. Context

India's industrial sector is a key driver of economic growth, employment, and exports, while also contributing significantly to national energy consumption and GHG emissions. Achieving India's climate commitments, including its NDCs, Long-Term Low Emissions Development Strategy, and net-zero target by 2070, requires accelerated decarbonisation of energy- and emissions-intensive industries.

At the same time, evolving global climate policies, particularly the Carbon Border Adjustment Mechanism (CBAM), are reshaping international trade dynamics. The European Union accounts for more than 17% of India's total trade value, and approximately USD 5.7 billion of Indian exports to the EU are expected to be impacted by CBAM-related requirements. This presents both compliance challenges and opportunities for Indian industries, particularly export-oriented and hard-to-abate sectors, to strengthen carbon accounting, Environmental, Social, and Governance (ESG) integration, and low-carbon competitiveness. The Bureau of Energy Efficiency (BEE), under the Ministry of Power, plays a key role in advancing industrial energy efficiency through policy instruments and schemes such as the *Assistance in Deploying Energy Efficient Technologies in Industries & Establishments* (ADEETIE), particularly supporting MSMEs in adopting low-carbon technologies and mobilising investments. However, translating policy into impact requires stronger technical, institutional, and implementation capacities.

Gender and social inclusion gaps remain significant in industry, especially in sectors relevant to energy efficiency and decarbonisation. Limited representation of women and marginalised groups, along with the absence of gender-disaggregated data, constrains inclusive integration in line with ESG principles.

In this context, GIZ India, on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ), is implementing the "Energy Efficiency in India" project in partnership with BEE. The project promotes industrial decarbonisation strategies (including in the context of the Indian Carbon Market) through incentive mechanisms, demonstration projects, awareness measures, and the integration of gender equality and social inclusion.

Key components are focussing on delivering scalable, policy-relevant solutions aligned with international best practices and India's market context in supporting low-carbon growth, export competitiveness, and equitable participation. This undertaking will be in the framework of the sectors and locations which are part of the ADEETIE scheme.

To operationalise this, GIZ will engage a qualified consulting firm/consortium to provide comprehensive technical assistance covering analytics, implementation, capacity building, and knowledge management, as outlined in this Terms of Reference.

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2. Tasks to be performed by the contractor

2.1 Term

The expected term of the contract for services must be specified in the 'Special terms and conditions of contract'. The definitive term and service delivery period are set out in the contract award notification.

2.2 Objectives, indicators, work packages, milestones

The objective of the assignment is to support industrial decarbonisation and CBAM preparedness in selected industrial sectors through technology identification, product-level carbon accounting, capacity building, pilot implementation, and structured upscaling aligned with BEE programmes, while systematically integrating gender equality and diversity considerations through a gender baseline assessment and a gender-responsive implementation approach.

In particular, the assignment will aim to:

- Build institutional and industry capacity on ESG, CBAM, product level accounting, gender-responsive decarbonisation, and inclusive industrial practices
- Promote innovative technologies and decarbonisation through pilot projects based on technology subsidies and upscaling of piloted technologies,
- Collect gender disaggregated data across selected sectors and locations to assess the gender representation and support industries in up taking gender responsive measures
- Monitor and evaluate the impact of the interventions.

The contractor shall conduct a detailed technical and commercial assessment to identify innovative, commercially proven technologies (TRL 9/10) with high potential for GHG emission reductions. This includes stakeholder consultations and, where relevant, negotiations to validate feasibility and deployment conditions. Based on the assessment, the contractor shall develop sector-specific technology deployment roadmaps outlining implementation pathways, investment requirements, timelines, risks, and scalability potential. The sectors and clusters for this assignment align with the ADEETIE Sectors and Clusters (ref. Annexe 1).

The contractor is responsible for achieving the objectives described in two work packages in this document.

The tasks under this contract will be supporting the project's objectives. Specifically, the following Outputs and Indicators as per the project's results matrix:

Module objective:

The decarbonization of Indian industry is institutionalized in a sustainable and inclusive way in selected sectors.

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Module Target Indicator 2

Investment volume mobilised by BEE funding programmes to finance decarbonisation measures in micro, small and medium-sized enterprises (MSMEs).

Baseline: 0 EUR Investment volume (01/2025) (The Funding Program ADEETIE is a new and the first funding program that has not yet provided funding for decarbonization measures.)

Target: 500.000 EUR Investment volume (05/2029)

Output 2: Support offers for decarbonisation are used by MSMEs in selected industrial sectors.

Output indicator 2.2: Number of MSMEs using decarbonisation services offered by State Designated Agencies or industry associations.

Baseline: 500 MSMEs (01/2025)

Target: 1.000 MSMEs (05/2029)

Module Target Indicator 3

Number of decarbonization measures replicated in selected industrial clusters.

Baseline: 60 Decarbonisation measures (01/2025)

Target: 110 Decarbonisation measures (12/2028)

Output 3: The technical and economic conditions for replicating decarbonisation measures have improved in selected industrial clusters.

Output indicator 3.1: Number of programs to implement decarbonization measures in selected industrial clusters where the technology to be replicated is disseminated.

Baseline: 60 Programme (01/2025)

Target: 65 Programme (05/2029)

Output indicator 3.2: Number of decision-makers who use examples to confirm improved knowledge of the business case of decarbonization measures.

Baseline: 0 Decision-makers (01/2025) (The understanding of business cases for decarbonization measures among decision-makers of industrial companies has not yet been systematically measured. In addition, no documented survey of the use of existing knowledge could be identified.)

Target: 300 Decision-makers (12/2028)

Module Target Indicator 4

Number of industrial companies or organizations with strengthened gender policies as part of their decarbonization process.

Baseline: 4.000 Industrial companies or organizations (01/2025)

Target: 4.500 Industrial companies or organizations (05/2029)

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Output 4: The basic conditions for the inclusion of women and people from marginalised groups have been improved in the context of decarbonisation in selected companies.

Output indicator 4.1: Number of industrial clusters for which data are available on the inclusion of women and people from marginalised groups in the context of decarbonisation processes.

Baseline: 2 Industrial clusters (01/2025)

Target: 10 Industrial clusters (05/2027)

Output indicator 4.2: Number of measures for women and people from marginalised groups implemented in selected companies or organisations as part of the decarbonisation processes.

Baseline: 1 Measure (01/2025)

Target: 4 Measures (05/2029)

The contractor is responsible for providing the following work packages and for achieving the corresponding milestones:

- **Work Package A (WPA):** Technical Decarbonisation, Pilots and Upscaling, and Knowledge systems
- **Work Package B (WPB):** Gender-Disaggregated Data Study and Strengthening of (workplace) Policies in MSME Clusters

The detailed scope under each Work Package is outlined below.

A. Work Package A: Technical Decarbonisation, Pilots and Upscaling, and Knowledge systems

WPA aims to strengthen industrial decarbonisation and carbon market preparedness across selected sectors and clusters. It focuses on identification and techno-economic assessment of priority low-carbon technologies, development of a CBAM-aligned product-level carbon accounting tool, implementation of pilot demonstration projects, structured capacity building on ESG and carbon markets, and establishment of a robust Monitoring, Reporting and Verification (MRV) framework. The objective is to deliver scalable, policy-aligned, and market-relevant solutions that enhance industry competitiveness, support compliance with emerging international trade measures, and contribute to India's low-carbon transition.

The scope includes, but is not limited to, the following components:

A.1 Technology Identification and Sectoral Baseline

The contractor needs to identify, assess, and deploy commercially viable and scalable technologies that are essential to support industrial decarbonisation, improve energy performance, and enhance the competitiveness of Indian industries, particularly MSMEs under the ADEETIE scheme. In this regard, establishing sectoral baselines and assessing technology options will provide the foundation for prioritising interventions with high energy-saving and emission-reduction potential; while ensuring technical and financial feasibility within the Indian industrial context. The contractor is required to:

1. Conduct sector-wise baseline assessments of all the 14 sectors (ref. Annexure 1) included in the ADEETIE scheme covering:
 - Energy consumption patterns,
 - Emissions profiles,
 - Production processes and operational practices.
2. Identify and assess at least 3 technologies in each sector based on a set of criteria. Overall, 701 technologies across different sectors need to be identified. The minimum/fixed criteria for selection of technologies is an energy saving of 10%. Additionally, the contractor shall define further criteria related to commercial viability, market-readiness, high potential for GHG emission reduction, high impact, innovativeness, considering cross-cutting and process specific approaches which should support in selecting most promising technologies ready to pilot.
3. Screen and prioritise technologies under the following categories:
 - Global/EU energy efficiency technologies,
 - Industrial energy efficiency technologies,
 - Fuel switching and electrification options,
 - Process optimisation measures.
4. Assess technology maturity, scalability, and applicability within the Indian industrial context.
5. Conduct techno-economic analysis for all the identified technologies under 2., including but not limited to:
 - Capital expenditure (CAPEX),
 - Operational expenditure (OPEX),

¹ A technology counts as one technology as soon as it's deployed in a different sector. If one technology is identified to be suitable to use in two different sectors, it counts as two technologies (one per sector).

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- Payback period and financial viability.
- 6. Estimate emission reduction potential of all the identified technologies (absolute and intensity-based).
- 7. Assess relevance and implications under EU CBAM requirements.
- 8. Facilitate the vetting and validation of proposed pilot technologies by the Review Committee².

A.2 Development of a Product-Level Carbon Accounting tool

The activity involves developing a CBAM-aligned product-level carbon accounting tool for Indian MSMEs to measure and report embedded emissions in line with EU CBAM methodology³, ISO 14064, and the GHG Protocol. The tool will cover Scope 1, Scope 2, and product-level emissions, with a user-friendly interface, pilot testing, validation, and final deployment to support industry readiness for emerging low-carbon trade requirements. The tool will specifically focus on the iron and steel sector. In this context the contractor is required to:

1. As baseline for the tool, design and develop a CBAM-aligned product⁴-level carbon accounting methodology.
2. Ensure methodological alignment with:
 - EU CBAM methodology,
 - ISO 14064 and/or the GHG Protocol, as applicable.
3. Define and document:
 - System boundaries,
 - Emission factors,

² All identified technologies will be submitted to a Review Committee comprising representatives from Bureau of Energy Efficiency, GIZ, and other key stakeholders associated with the ADEETIE scheme. The Review Committee will evaluate the presented technologies in alignment with the objectives of the ADEETIE scheme before recommending them for further consideration and implementation.

³ The European Union's Carbon Border Adjustment Mechanism (CBAM), which comes fully into effect in 2026, initially targets six carbon-intensive sectors considered to be at high risk of carbon leakage, namely iron & steel, cement, aluminium, fertilisers, electricity, and hydrogen. These sectors are subject to stringent emissions reporting requirements and financial adjustments based on embedded carbon emissions. In this context, the initial focus of the ToR shall be on the iron & steel sector.

⁴ The term 'product' referred to herein denotes the output manufactured by the MSMEs.

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- Calculation methodologies and logic.
- 4. Ensure coverage of:
 - Scope 1 (direct) emissions,
 - Scope 2 (indirect) emissions,
 - Embedded emissions at product level.
- 5. Develop a user-friendly interface suitable for SMEs and MSMEs. The final format of the tool shall be proposed by the contractor.⁵
- 6. Develop a beta version of the tool and conduct pilot testing in at least one (1) industrial company.
- 7. Incorporate feedback from pilot testing and finalise the tool for deployment.
- 8. Validate all data inputs, calculations, and outputs to ensure methodological robustness.
- 9. Prepare and submit:
 - Technical documentation,
 - Step-by-step user manual,
 - FAQs and troubleshooting guide.
- 10. The dissemination of the tool shall be part of the in-A.3 described capacity development activities.

A.3 Capacity Development (ESG, CBAM and Industrial Decarbonisation)

This activity aims to strengthen the capacity of Indian industrial MSMEs on CBAM compliance, ESG reporting, industrial decarbonisation, and carbon accounting through sector-specific training programmes and technical guidance materials. This shall be done in close cooperation with associations or State Nodal Agencies (SDAs) as in-person training programmes. In this regard, the contractor is required to:

Organise 20 training programmes of 1-day duration each (10 CBAM & 10 ESG) with minimum participation of 40 persons, including all associated logistical arrangements as well as participant management in coordination with Associations or SDAs through invitations etc. The logistical costs shall include, but not be limited to, venue arrangements, food and refreshments, drinking water, tea/coffee, AV/DV setup, and stationery required for the training programmes. The cost of the training programmes shall be reimbursed on an actual basis, subject to approval.

⁵ The format of the tool would be an offline software. No online version is foreseen which could be data sensitive.

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1. Conduct a Training Needs Assessment across selected sectors and clusters (refer to Annexure 1)
2. Design structured training programmes covering:
 - CBAM regulations and compliance requirements,
 - ESG frameworks and reporting standards,
 - Industrial decarbonisation strategies,
 - Use and application of the under- A.2 developed carbon accounting tool.
3. Develop separate training curricula, case studies, and sector-specific technical guidance materials for CBAM and ESG with quantity required for conducting the 20 training programmes.
4. Consequently, conduct the twenty (20) in-person training programmes across identified industrial clusters.
5. Ensure participation of at least five hundred (500) SMEs and large industrial units, including industry decision-makers as part of the 20 workshops.
6. Ensure that all training design and delivery align with BMZ's Feminist Development Policy and GIZ's Safeguards and Gender Framework.

A.4 Implementation, Monitoring, Reporting, Verification (MRV) and Upscaling of Selected Pilots

The intent of this activity is to facilitate the deployment and demonstration of energy-efficient technologies with the objective of achieving a minimum of 10% energy savings in participating industries. Recognising that certain technologies require pilot demonstration prior to wider adoption, the assignment shall support ten (10) pilot technologies with high replication potential, each having the potential to scale-up to at least five (5) additional deployments. To strengthen the enabling ecosystem, build confidence among MSMEs, and support long-term market uptake, selected technologies may also be supported through subsidy assistance.

Under this component, the Contractor shall be responsible for the implementation, monitoring, reporting, verification, and replication support of the selected pilot projects. In this regard, the Contractor shall undertake the following activities:

1. Final selection and implementation of ten (10) pilot projects, with:
 - Maximum one (1) pilot per sector with the approval from the committee
 - Funding support for technologies provided either up to 50% of the technology cost or a maximum of EUR 18,000 per technology, whichever is lower,
 - A targeted replication and upscaling approach aiming for at least five (5) additional deployments for each successfully demonstrated pilot technology.
2. Develop detailed pilot project designs, including:
 - Technical specifications,
 - Implementation schedules and Milestones,

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- Capital and operating cost estimates
- 3. Conduct comprehensive risk assessments covering technical, financial, operational, and regulatory aspects, and propose suitable mitigation measures.
- 4. Provide technical assistance to participating industrial companies during pilot implementation, including:
 - Support for technology deployment and commissioning,
 - Monitoring progress against agreed milestones,
 - Troubleshooting support and corrective actions, as required.
- 5. Develop for each of the ten (10) pilot projects:
 - Industry-specific decarbonisation action plans,
 - Sector-wise replication and upscaling frameworks,
 - Bankable business cases for wider market adoption
- 6. Develop and operationalise a comprehensive Monitoring, Reporting and Verification (MRV) framework for the ten (10) pilot projects, aligned with internationally recognised standards such as ISO 14064, the GHG Protocol, and relevant CBAM requirements (if applicable), including:
 - Definition of methodologies, system boundaries, emission factors, data sources, and Quality Assurance/Quality Control procedures,
 - Establishment and validation of baseline indicators related to energy consumption, production levels, emissions (Scope 1 and Scope 2), and CBAM/ESG readiness,
 - Quantification and tracking of energy savings and GHG emission reductions (absolute and intensity-based) for a period of one (1) year following installation of each pilot technology,
 - Monitoring of CBAM readiness indicators, including product-level emissions accounting and data transparency systems,
- 7. Submit periodic, evidence-based monitoring and progress reports to GIZ covering implementation status, achieved outcomes, energy savings, emission reductions, and sector-wise/cluster-wise analysis of pilot performance.
- 8. Ensure that the deployed technologies and associated MRV systems are designed and implemented in a manner that supports their long-term sustainability, continued operation, and scalability beyond the contract duration.
- 9. Document best practices, lessons learned, and scalable models emerging from pilots and tool deployment
- 10. Support dissemination, replication, and wider adoption of demonstrated technologies and solutions through workshops and stakeholder engagement activities, as outlined under Section A.5
- 11. Develop knowledge products for 50 dissemination workshops. Key knowledge product shall be outlining each pilot as a case study (text summary + visual infographic or similar) for industry and policy stakeholders.
- 12. Organise 50 dissemination workshops to promote replication, knowledge sharing, and peer learning of 10 pilots (considering 5 upscales of each pilot), with a minimum participation of 40 stakeholders in each workshop. The final outcome needs to be 50

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replications⁶ of the 10 pilot projects. The contractor needs to ensure replications and provide respective evidence. The contractor shall be responsible for all associated logistical arrangements, including but not limited to venue arrangements, food and refreshments, drinking water, tea/coffee, AV/DV setup, and stationery required for the workshops, as well as participant management. The workshop costs shall be reimbursed against evidence.

A.5 Dissemination and Final Reporting

The contractor is required to:

1. Provide technical inputs to national policy dialogue processes, as required by GIZ/BEE.
2. Submit a comprehensive Final Technical Report for all work done under WPA and WPB. This should cover all consolidated findings incl. activities, quantified impacts, policy recommendations, lessons learnt, knowledge products, and all other aspects covered under this contract.

Milestones for Work Package A	Delivery period
Submission of detailed Inception Report, including workplan, governance structure (Core Working Group, Technical Working Group, Steering Committee), and nomination of focal point for work package 1 & 2	Within 2 weeks of contract award
Identification and preparation of longlist and shortlist of new and innovative technologies (minimum three per sector), including detailed techno-economic analysis, scalability and implementation roadmap	Within 4 months of contract award
Formal approval of ten (10) pilot entities/sites, including submission of baseline assessments, selection criteria, feasibility analysis, and implementation roadmap for each pilot intervention.	Within 6 months of contract award

⁶ Replication means the dissemination of individual demonstration projects within industrial clusters. Replication has begun when another company has made a binding investment decision (commitment of funds, ordering of components, implementation of improved production processes).

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Development of methodology for CBAM-aligned carbon accounting tool,	Within 6 months of contract award
Development of Beta version of CBAM-aligned carbon accounting tool, completion of pilot testing, incorporation of feedback, and submission of final tool with documentation and user manual	Within 10 months of contract award
Development of ESG/CBAM and carbon accounting tool training materials and curriculum	Within 6 months of contract award
Conduct twenty (20) industry training and awareness programmes on ESG, CBAM and carbon accounting tool (<i>Participation of at least 500 different industries and includes more than 300 decision makers in all these programmes</i>)	Within 12 months of contract award
Successful implementation and completion of the first batch of 10 (ten) pilots' interventions, including submission of technical documentation, implementation evidence, beneficiary confirmation, monitoring records, and submission of performance assessment results	Within 18 months of contract award
Conduct and facilitate twenty-five (25) dissemination and upscaling workshops linked to the approved pilot projects. This includes upscaling/replication interventions, supported by evidence of adoption, beneficiary confirmations, and replication documentation.	Within 22 months of contract award
Conduct and facilitate twenty-five (25) dissemination and upscaling workshops linked to the approved pilot projects. This includes upscaling/replication interventions, supported by evidence of adoption, beneficiary confirmations, and replication documentation.	Within 25 months of contract award

B. Work Package B (WPB): Gender-Disaggregated Data Study and Strengthening/Development of Workplace Policies in MSME Clusters

The objective of this work package is to generate robust, evidence-based insights into the participation, roles, and working conditions of women and marginalised groups⁷ in selected MSME clusters under the ADEETIE scheme and – based on the insights – support the strengthening/development of gender-responsive workplace policies and institutional mechanisms across the 14 sectors covering 20 clusters and approximately 700 MSME companies.

The assignment will:

- Assess workforce participation and representation of women and marginalised groups across selected MSME clusters and sectors.
- Review existing workplace practices, institutional systems, and gender-responsive policies at company and cluster levels.
- Identify key barriers, gaps, and enabling factors impacting inclusion and workforce participation.
- Provide practical and policy-oriented recommendations for MSMEs, industry associations, and public stakeholders.
- Support development/strengthening and implementation of gender-responsive workplace policies and institutional processes.
- Consolidate findings into a comprehensive analytical report to guide future interventions, capacity-building activities, and implementation support

The contractor will be responsible for selecting 20 clusters from the 60 clusters listed in Annexure 1 and submitting the proposed selection to the project for approval, based on secondary research and industry engagement to ensure alignment with the objectives of the assignment.

⁷ Marginalised groups in the Indian context are people who are marginalised and disadvantaged in their participation in economic and social life due to various factors such as: religion, ethnicity (e.g. Adivasis), caste (especially Dalits), origin (e.g. foreigners, those not born in India, those born in poor Indian states), sexual orientation (LGBTQ+), age (children and older people), living conditions e.g. single mothers, divorced women, widows, etc.

B.1 Gender-Disaggregated Data Study.

The objective of this study is to generate robust gender-disaggregated data insights across 20 MSME clusters covering approximately 700 MSME companies, in order to understand the current status of workforce composition, roles, participation, and workplace practices. The study aims to identify gender gaps, barriers, and enabling factors within MSMEs and translate them into evidence-based recommendations.

To ensure compliance with GIZ data protection requirements, the contractor must handle all personal and sensitive information with utmost care and strictly adhere to the policy of “anonymization by default”. This means the contractor shall not collect, process or share with GIZ any identifiable information of the companies where the data study is conducted (for more information on data protection, see chapter [2.4 Data protection and information security](#)). The entire data collection process will be routed through the respective cluster associations. Data collected from companies shall be through anonymous surveys, ensuring that identification of individual company names and hence individuals is not possible.

The contractor shall not share any information of the visited companies with GIZ or any third party.

B.1.1 Desk Review, Study Design and Methodology

1. Preparation of an **Inception Report** detailing:
 - Overall study framework and methodological approach
 - Sampling design and industrial cluster selection strategy
 - Data collection methods and proposed quantitative and qualitative tools
 - Risk assessment and mitigation measures
2. Conduct a comprehensive **desk review** on gender and social inclusion in the context of industrial decarbonisation, covering:
 - Relevant national policies, legal frameworks, and guidelines
 - International frameworks and commitments (e.g. gender equality, just transition)
 - Existing sectoral and cluster-level studies and good practices
3. Selection of 20 industrial clusters across 14 sectors mentioned under ADEETIE scheme ensuring consideration of, but not limited to the below criteria
 - Alignment with sectors selected for technical decarbonisation support (WPA)
 - Sectoral and regional diversity to ensure representation across different regions/states to capture diverse socio-economic, industrial, and cultural contexts.

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- Existing or potential participation of women in the workforce, including production, technical, supervisory, administrative, and leadership roles.
 - Availability and willingness of cluster associations/companies to facilitate coordination and feasibility of conducting anonymous gender-disaggregated data collection.
 - Preference shall be given to clusters where findings can inform or support the development/strengthening of gender-responsive workplace policies and institutional practices.
4. Mapping of **key stakeholders** relevant for gender-responsive decarbonisation, including:
- Cluster and industry associations
 - Companies within clusters with the support of associations
 - Local skilling and training institutions
 - Women's organisations and relevant civil society actors

B.1.2 Field Visit and Data Collection

1. Define a core set of **gender- and social-inclusion indicators for the Indian industry context**, including minimum criteria, benchmarks, and reference standards aligned with national regulations and international good practices.
2. Develop structured **data categories**, including but not limited to:
 - Workforce composition (women, men, and marginalised groups disaggregated by function, skill level, and hierarchy)
 - Gender-responsive workplace infrastructure and facilities
 - Existing workplace policies and institutional mechanisms (e.g. maternity and paternity benefits, prevention of sexual harassment, flexible work arrangements)
 - Participation in training, upskilling, and decarbonisation- and green-skills–related initiatives
 - Enabling conditions for career progression, retention, and leadership development
3. Conduct field visits and consultations with key stakeholders, including:
 - Cluster and industry associations
 - MSME owners, management, and Human Resource representatives
 - Local skilling, training, and technical support institutions
4. Collect primary data using a mixed-methods approach, including:
 - Structured enterprise- and worker-level surveys
 - Semi-structured interviews with management and institutional stakeholders

- Qualitative tools, including focus group discussions and case study documentation

B.1.3 Data analysis and Reporting

1. Clean, consolidate, and quality-check quantitative and qualitative datasets to ensure accuracy and reliability.
2. Undertake integrated analysis across clusters and sectors to generate comparative and cross-cutting insights.
3. Identify key patterns, disparities, barriers, enabling factors, and good practices related to gender and social inclusion, including replicable approaches at cluster and enterprise levels.
4. Prioritise critical gaps and risks, such as weak or absent workplace policies, low representation of women and marginalised groups in technical and decision-making roles, and limited institutional awareness or capacity.
5. Convene an internal validation and reflection workshop with GIZ to review and refine preliminary findings.
6. Prepare a comprehensive analytical report covering methodology, scope, cluster- and sector-level findings, key data visualisations, and evidence-based recommendations.
7. Develop communication-ready outputs (infographics, factsheets, short case examples) to support outreach and dissemination.
8. Formulate a forward-looking action framework identifying practical entry points for integrating gender equality and social inclusion as part of the framework on decarbonisation measures covered by this assignment.

B.2 Implementation and Scaling of Gender-Responsive Policies

Implementation and scaling of gender-responsive policies by strengthening workplace systems, institutional processes, and inclusive practices to promote safer, equitable, and gender-inclusive industrial environments. This will be supported through direct, hands-on assistance to facilitate adoption and implementation across the same 20 MSME clusters covering approximately 700 MSME companies selected to conduct the data study in B.1. The handholding is foreseen in an aggregated approach where several companies are supported through workshops and further direct consultation.

B.2.1 Implementation Planning

Translation of findings from Part B.1 into cluster-specific support and implementation plans, including:

- Identifying key policy gaps

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- Defining practical implementation paths
- Clarifying roles and responsibilities of companies, cluster associations, and support partners

B.2.2 Policy and Institutional Framework Development

1. Develop or strengthen gender-responsive and socially inclusive standardised core policy package tailored to industrial and MSME contexts.
2. Technical assistance to develop or strengthen workplace policies, including:
 - Gender equality and non-discrimination policies
 - Prevention of Sexual Harassment (POSH) frameworks
 - Flexible work arrangements and return-to-work policies
 - Safe working conditions and gender-responsive facilities
3. Prepare implementation guidelines and templates tailored for MSMEs and cluster associations.
4. Legal and technical validation of the policy templates, in close coordination with GIZ and relevant legal experts.

B.2.3 Hands-on Implementation Support (Handholding) & Capacity Building

The contractor shall organise 35 awareness sessions with minimum participation of 20 companies, including all associated logistical arrangements. The logistical costs shall include, but not be limited to, venue arrangements, food and refreshments, drinking water, tea/coffee, AV/DV setup, and stationery required for the sessions. The cost of the sessions shall be reimbursed on an actual basis, subject to approval.

1. Provide close, practical, on-the-ground assistance to companies to help them move from planning to actual implementation of policies by
 - Step-by-step guidance
 - Official adoption of policies (sign-off, stamping, internal approval)
 - Internal communication and dissemination to staff
2. Design and delivery of 35 cluster-level awareness sessions on the business case, regulatory and ESG relevance, and practical implementation of gender-responsive and socially inclusive decarbonisation, including industry case studies and good practices for:
 - Company management and leadership
 - Human resources personnel
 - Operational and technical staff
 - Cluster and industry association representatives

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B.2.4 Strengthening Cluster Associations as Multipliers

1. Support cluster associations to include gender and social inclusion in their advisory and support services.
2. Support associations to share guidance, policy templates, and tools with member companies, and promote peer learning through industry working groups, experience-sharing sessions, and knowledge-sharing platforms to encourage the adoption of gender-responsive practices.
3. Build ownership and leadership of cluster associations to treat gender inclusion as a key priority for cluster development and decarbonisation.

B.2.5 Scaling of Good Practices and Way Forward

1. Identification and support of early adopters and champions within clusters.
2. Documentation of good practice examples and scalable models.
3. Development of short case studies highlighting:
 - Practical steps taken
 - Benefits for companies
 - Lessons learned
4. Dissemination of case studies through cluster networks and GIZ communication channels.
5. Consolidation of implementation results across clusters and companies.
6. Identification of key lessons learned, success factors, and remaining gaps.
7. Final coordination with GIZ to align outcomes with programme objectives.
8. Preparation of a final implementation summary and way-forward note.

Milestones for work package B	Delivery period
Datasheet outline with data parameters	Within 4 months of contract award
Data compilation report	Within 8 months of contract award
Final report of findings and suggestions	Within 12 months of contract award
Standardised policy package (early on from kick-off)	Within 17 months of contract award
Handholding workshops completed in minimum 10 Clusters	Within 24 months of contract award
Proof of strengthened or newly adopted gender-responsive policies in at least 500 companies.	Within 25 months of contract award

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2.3 Project and Knowledge Management Requirements

Requirements on the implementation structure:

The contractor is required to:

- Conduct an inception meeting with GIZ within 15 days of contract award, ensuring participation of all key team members.
- Nominate a focal point of contact for coordination.
- Support the establishment of a Steering Committee (including GIZ and BEE) responsible for validation of identified technologies, approval of costing, and pilot selection.

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 technologies and aligned equipment available and covers their operating and administrative costs as part of the piloting and MRV.

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. The contractor shall propose a suitable format for monitoring/reporting latest within 2 month of contract award. Regular monitoring activities must cover at least the following areas (including specifics on numbers):
 - Degree to which activities are implemented
 - Degree to which the objectives, indicators and milestones listed in section 2.2 of these ToRs have been achieved. This shall be also in line with the objectives as outlined under chapter 2.2..
 - Results that have occurred in the contractor's sphere of responsibility
 - Results that have occurred outside the contractor's direct sphere of responsibility
 - Challenges if any occurred
 - Risks which are foreseen

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- Adopt and use the GIZ-provided format for Minutes of Meeting (MoM) where meetings on the collaboration take place.

The contractor reports to GIZ as follows:

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

1. Inception report Due Date **20 days** after contract award. Submit an Inception Report including:
 - o Detailed work plan with timelines and milestones,
 - o Staffing plan and allocation of responsibilities,
 - o Proposed Core Working Group, Technical Working Group, and Steering Committee structure,
 - o Methodological approach,
 - o Coordination strategy with industry associations,
 - o Approach for future scenario analysis and projections.
- Interim report(s) within 6 month from contract award; 12 month after contract award; 18 month after contract award
- Final report with the contract end (draft report has to be submitted 1 month before contract end).

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.

Additionally, the contractor is required to produce:

- Bi-monthly brief reports on the implementation status of the project (5-7 pages).

Requirements for company-wide learning, knowledge and innovation:

- Not applicable –

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;

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- 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 data protection and information security provisions set out in the most recent GIZ AVB (sections 1.7. Confidentiality and 1.11 Data Protection) apply.

The performance of the contract may be associated with the processing of personal data by the contractor, such as (but not limited to) names and contact information. In such cases, the contractor shall act as an independent DATA CONTROLLER and must alone comply with ALL applicable data protection obligations, including those stemming from regional and local laws. The contractor shall process personal data only when a given goal cannot be reasonably attained without such data. The data protection principles such as lawfulness, data minimization, accuracy, purpose limitation, storage limitation, transparency, integrity and confidentiality, and accountability, as well as the numerous rights of the data subject must be paid due attention. The GIZ is NOT in any way responsible for such processing.

Whenever the contractor executes the instructions of a partner to the GIZ with regard to such processing, the partner shall be the data controller, and the data processing shall be carried out in accordance with the partner's instructions as well as laws and standards to which it is subject.

Unless explicitly required by GIZ, any reports, surveys, or any other data and information shared with GIZ must be provided strictly anonymously, meaning that any information relating to an identified or identifiable natural person ('data subject') must be excluded. In the context of this ToR, this also means that **the contractor shall not collect, process themselves or share with GIZ any identifiable information of the companies where the study is conducted**, because this data could be considered personal data.

If the contractor is not subject to the GDPR and the applicable laws do not contain any explanation on the data protection principles and rights mentioned here, the definitions and meanings provided by the GDPR (Regulation (EU) 2016/679) should be considered.

2.5 Other requirements

Safeguards and gender measures with specific reference to services:

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

Gender equality:

- Integrate gender equality and inclusion principles across all activities, including data collection, policy development, and capacity building.
- Ensure that all gender-disaggregated data is collected, processed, and reported in an ethical, confidential, and anonymised manner, with no disclosure of identifiable personal or company-level information.
- Promote equal participation of women and marginalised groups and men in consultations, surveys, and workshops, with special attention to meaningful engagement of women in companies
- Ensure that project outputs contribute to reducing gender gaps in employment, leadership, and access to skills opportunities.

Environmental protection and climate action (climate change mitigation/adaptation):

- Ensure that industrial decarbonisation measures do not cause any unintended harm to the environment and follow a sustainable, environmentally responsible approach.
- Ensure all activities support industrial decarbonisation through energy efficiency, low-carbon technologies, and sustainable production practices.
- Promote awareness of the linkages between gender inclusion and sustainable industrial transformation within MSME clusters.

Conflict and context sensitivity:

- Ensure that all stakeholder engagement is conducted in a context-sensitive manner, respecting local industrial, social, and institutional dynamics.
- Apply a “do no harm” approach in all fieldwork, consultations, and capacity-building activities.
- Ensure transparent communication with cluster associations and industry stakeholders to maintain trust and cooperation.
- Adapt implementation approaches to local contexts, ensuring flexibility in engagement strategies across diverse industrial clusters.

Human rights:

- Ensure full respect for internationally recognised human rights principles throughout implementation, including non-discrimination, equality, and dignity at work.
- Safeguard confidentiality and privacy of all respondents, ensuring informed and voluntary participation in data collection activities.

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- Ensure that no activity contributes to or supports discrimination, exploitation, or exclusion of any group.
- Ensure that all outputs and recommendations contribute to inclusive and equitable industrial development.

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 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.

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

Processes describe actions or sets of tasks that are necessary in order to render specific services in a sector or in the cooperation/partner system. Specific actors are given responsibility for determining and implementing these actions and sets of tasks in line with the regulations. Actors are usually institutions such as ministries, local governments, associations and chambers, non-governmental organisations, companies in a sector or individual businesses, universities or banks, but may also be individuals (e.g. a person with higher decision-making authority).

The tenderer is required to describe, using existing documents where possible (see annexes), the processes in the sector or partner system that are relevant to the services put out to tender (section 1.2.1 of the assessment grid). The tenderer is required to present the actors (partners and others) who are relevant for the tender in the form of a map of actors.

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

3.3 Strategy (section 1.3 of the assessment grid)

The strategy for delivering the services in the tender is the core element of the technical-methodological concept. It is composed of the following elements:

- Procedure for achieving the objectives stated in section 2.2 of these ToRs
- Development of partnerships with the relevant actors
- Approaches for leverage effects and measures for scaling-up
- Consideration of environmental and social compatibility requirements (including gender 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. Hereby key focus should be on:

- The process of how and based on which criteria the priority technologies are proposed to be identified.
- How to conceptualise and implement capacity development workshops in collaboration with Associations or SDAs
- How the WPB regarding gender integration can be taken up in synergies to WPA.

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

– Not applicable –

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

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

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3.3.4 Consideration of environmental and social compatibility requirements

(section 1.3.4 of the assessment grid)

Gender equality

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

Environmental protection and climate action (climate change mitigation/adaptation)

The tenderer is required to outline in the tender how it can prevent negative impacts on the environment and the climate in its area of responsibility and, in addition, how it can contribute to improving the environmental and climate situation through corresponding measures (see also relevant requirements in section 2.5).

Requirement: 'Gender equality':	7 points out of 10 (maximum)
Requirement: 'Environmental protection and climate action (climate change mitigation/adaptation)':	3 points out of 10 (maximum)

3.4 Project management

(section 1.4 of the assessment grid)

In this section, the tenderer presents the operational plan for implementing the services in the tender, describes the procedure for coordination with GIZ or the project and the project partners, and explains its monitoring procedure.

3.4.1 Operational plan

(section 1.4.1 of the assessment grid)

The tenderer is required to draw up and explain an operational plan for implementing the strategy described in section 3.3, including a plan for the assignment of all the experts included in the tender. The operational plan must include the assignment times (periods and expert days) and assignment locations of the individual experts, the milestones as presented in section 2 and, 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.

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3.4.2 Coordination with GIZ or the commissioning project

(section 1.4.2 of the assessment grid)

In the tender, the tenderer is required to describe the procedure for coordinating with GIZ or with the commissioning project. Specific focus should be on how the informing about on sight stakeholder management and engagement is planned, since the stakeholder coordination will play a crucial role.

3.4.3 Steering or coordination of measures with the relevant implementing partner

(section 1.4.3 of the assessment grid)

In the tender, the tenderer is required to name the implementing partners relevant for implementing the services and to describe and explain the procedure for steering or coordinating the measures with them.

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)

– Not applicable –

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.

- When selecting personnel for the project, the tendered must ensure that the team is balanced in terms of gender and age

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- For the successful delivery of the training program, a diverse group of experts with specialised knowledge of energy efficiency, ESG & CBAM, Carbon Accounting, Industrial sectors is expected to be involved for the entire duration of the project.

Expert 1: Team Leader with International Experience (section 2.1 of the assessment grid)

This position is a key expert.

Tasks of expert 1:

- Provide overall strategic, technical, and managerial leadership for the assignment.
- Coordination between all experts and expert pools.
- Lead inception phase, including finalisation of methodology, governance structures, and stakeholder coordination mechanisms.
- Ensure alignment of all activities with project objectives, national policies (PAT, ADEETIE, Indian Carbon Market), and EU CBAM requirements.
- Oversee sectoral baseline studies, technology prioritisation, and techno-economic assessments.
- Guide development, validation, and deployment of the CBAM-aligned carbon accounting tool.
- Supervise pilot selection, design, implementation, and upscaling strategy.
- Ensure integration of ESG principles and gender-responsive approaches across activities.
- Lead engagement with GIZ, BEE, Steering Committee, industry associations, and financial institutions.
- Review and approve all technical deliverables prior to submission.
- Ensure quality assurance, risk management, and mitigation planning.
- Facilitate high-level policy dialogue and represent the project in national/international forums.
- Monitor team performance, timelines, budgets, and reporting.
- Ensure integration of ESG principles and gender-responsive, socially inclusive approaches across all project components, including baseline studies, pilot implementation, capacity building, MRV systems, and policy recommendations.
- Oversee incorporation of gender-disaggregated data, equitable participation of women and marginalised groups.
- Promote gender equality in MSMEs through the development and integration of gender-responsive policies and institutional practices.
- Other tasks (related to the Scope of Work) as and when deemed necessary.

Qualifications of expert 1:

Education/training (section 2.1.1 of the assessment grid):	University degree (Master's) in Engineering, Energy, Environment, Public Policy, Economics, or Sustainability management.
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Language (section 2.1.2 of the assessment grid):	Knowledge of English C1 - level in the Common European Framework of Reference for Languages
General professional experience (section 2.1.3 of the assessment grid):	10 years of professional experience in the industrial energy sector
Specific professional experience (section 2.1.4 of the assessment grid):	• 7 years of professional experience in conducting industrial energy audits (4 out of 10 points) • 7 years of professional experience working in Indian industrial sectors (2 out of 10 points) • 7 years of professional experience in Indian regulatory frameworks or national initiatives (BEE, PAT, ADEETIE, etc.) (2 out of 10 Points) • 5 years of professional experience in social inclusion (2 out of 10 points)
Leadership/management experience (section 2.1.5 of the assessment grid):	10 years of leadership experience in projects, companies or other organisations with disciplinary leadership responsibility for 10 people
International professional experience outside the country/region of assignment (section 2.1.6 of the assessment grid):	5 years of professional experience outside of India.
Professional experience in the country/ region of assignment (2.1.7 of the assessment grid):	-Not Applicable-
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):	-Not Applicable-

Expert 2: Energy Auditor (EA) with International Experience (section 2.2 of the assessment grid)

This position is a key expert.

Tasks of expert 2

- Conduct detailed baseline energy audits and emissions assessments across sectors.
- Analyse production processes to identify inefficiencies and optimisation opportunities.
- Identify fuel switching, electrification, and process optimisation measures.
- Quantify energy savings, emission reductions, and cost implications.
- Support preparation of techno-economic feasibility studies.

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- Contribute to development of pilot project technical specifications.
- Support monitoring and validation of implemented energy-saving measures.
- Provide sector-specific technical inputs for training modules.
- Assist in preparation of MRV framework for energy and emissions tracking.
- Support industries in data collection and verification processes.

Qualifications of expert 2.

Education/training (section 2.2.1 of the assessment grid):	University degree (Master's or Post Graduate Diploma) in Engineering, Energy, Environment, Climate Policy, Economics or sustainability management.
Language (section 2.2.2 of the assessment grid):	-Not Applicable-
General professional experience (section 2.2.3 of the assessment grid):	10 years of professional experience in industrial energy management
Specific professional experience (section 2.2.4 of the assessment grid):	• 5 years of professional experience in conducting industrial energy audits (5 out of 10 points) • 5 years of professional experience with Indian industrial energy sectors, regulatory frameworks, and national initiatives (BEE, PAT, ADEETIE, etc.) (5 out of 10 points)
Leadership/management experience (section 2.2.5 of the assessment grid):	5 years of management experience in companies or other organisations with disciplinary leadership responsibility for 3 people
International professional experience outside the country/region of assignment (section 2.2.6 of the assessment grid):	2 years of professional experience outside of India
Professional experience in the country/ region of assignment (2.2.7 of the assessment grid):	2 years of experience working in India
Experience in the field of development cooperation (section 2.2.8 of the assessment grid):	-Not Applicable-
Other (section 2.2.9 of the assessment grid):	Certified Energy Auditor or BEE Certified Energy Auditor

Expert 3: IT Tool Expert with International Experience (section 2.3 of the assessment grid)

This position is a key expert.

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Tasks of expert 3

- Design overall system architecture for CBAM-aligned carbon accounting tool.
- Develop calculation modules for Scope 1, Scope 2, and embedded emissions.
- Integrate emission factors and data validation logic.
- Develop secure and scalable backend database systems.
- Create user-friendly front-end interface for SMEs and industries.
- Conduct beta testing and incorporate user feedback.
- Ensure interoperability with ESG reporting systems.
- Provide technical support during pilot phase.
- Develop user manuals and troubleshooting guides.
- Ensure long-term maintainability and scalability of tool.

Qualifications of expert 3.

Education/training (section 2.3.1 of the assessment grid):	University degree (Bachelor's) in Computer Science/IT/Software Engineering
Language (section 2.3.2 of the assessment grid):	-Not Applicable-
General professional experience (section 2.3.3 of the assessment grid):	5 years of professional experience in software/tool development
Specific professional experience (section 2.3.4 of the assessment grid):	2 years of professional experience with carbon accounting tools (5 out of 10 points) 2 years of professional experience in industrial energy sectors, regulatory frameworks, or schemes on Energy Efficiency (5 out of 10 points)
Leadership/management experience (section 2.3.5 of the assessment grid):	-Not Applicable -
International professional experience outside the country/region of assignment (section 2.3.6 of the assessment grid):	-Not Applicable -
Professional experience in the country/ region of assignment (2.3.7 of the assessment grid):	-Not Applicable -
Experience in the field of development cooperation (section 2.3.8 of the assessment grid):	-Not Applicable -
Other (section 2.3.9 of the assessment grid):	-Not Applicable -

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Expert 4: CBAM Expert with International Experience (section 2.4 of the assessment grid)

This position is a key expert.

Tasks of expert 4

- Interpret EU CBAM regulations and reporting obligations.
- Develop CBAM-aligned product-level emissions methodology.
- Define embedded emissions calculation approaches.
- Advise exporting industries on compliance pathways.
- Support carbon accounting tool validation against EU requirements.
- Deliver CBAM-focused training sessions.
- Prepare technical notes and compliance guidance documents.
- Monitor updates to EU CBAM regulations and adapt framework accordingly.
- Support integration with Indian Carbon Market frameworks.
- Provide policy advisory inputs to GIZ/BEE.
- Conducting training and capacity development programmes to large audience of industrial sectors/decision makers

Qualifications of expert 4.

Education/training (section 2.4.1 of the assessment grid):	University degree (Master's or Post Graduate Diploma) in Engineering, Public Policy, Environmental Economics, Energy, Sustainability Management.
Language (section 2.4.2 of the assessment grid):	-Not Applicable-
General professional experience (section 2.4.3 of the assessment grid):	10 years of professional experience in the field of climate policy, carbon markets or Green finance.
Specific professional experience (section 2.4.4 of the assessment grid):	• 3 years of professional experience working in EU CBAM or Sustainability reporting (6 out of 10 points) • 2 years of professional experience in industrial energy sectors, regulatory frameworks, or schemes on Carbon Markets or Energy Efficiency. (4 out of 10 points)
Leadership/management experience (section 2.4.5 of the assessment grid):	2 years of professional experience in management
International professional experience outside the country/region of assignment (section 2.4.6 of the assessment grid):	5 years of professional experience working in EU countries

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Professional experience in the country/ region of assignment (2.4.7 of the assessment grid):	-Not Applicable-
Experience in the field of development cooperation (section 2.4.8 of the assessment grid):	-Not Applicable-
Other (section 2.4.9 of the assessment grid):	-Not Applicable-

Expert 5: ESG Expert with International Experience (section 2.5 of the assessment grid)

This position is a key expert.

Tasks of expert 5

- Integrate ESG frameworks into industrial decarbonisation strategy.
- Align ESG reporting with CBAM compliance and carbon accounting.
- Develop ESG capacity-building modules for industries.
- Advise industries on sustainability disclosures (GRI, SASB, TCFD).
- Support preparation of ESG-aligned decarbonisation action plans.
- Identify investor and regulatory ESG requirements relevant to sectors.
- Contribute to policy recommendations on ESG integration.
- Support gender and social inclusion alignment within ESG frameworks.
- Assist in preparation of ESG-focused knowledge products.
- Provide advisory inputs to ensure alignment with global ESG standards.
- Conduct training and capacity building programmes to large audience of industrial sectors/decision makers

Qualifications of expert 5.

Education/training (section 2.5.1 of the assessment grid):	University degree (Master's or Post Graduate Diploma) in Engineering, Public Policy, Environmental Economics, Energy or Sustainability Management.
Language (section 2.5.2 of the assessment grid):	-Not Applicable-
General professional experience (section 2.5.3 of the assessment grid):	10 years of professional experience working in the field of climate policy or carbon markets
Specific professional experience (section 2.5.4 of the assessment grid):	3 years of professional experience working in ESG compliance and reporting

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Leadership/management experience (section 2.5.5 of the assessment grid):	-Not Applicable-
International professional experience outside the country/region of assignment (section 2.5.6 of the assessment grid):	3 years of professional experience outside of India
Professional experience in the country/ region of assignment (2.5.7 of the assessment grid):	-Not Applicable-
Experience in the field of development cooperation (section 2.5.8 of the assessment grid):	-Not Applicable-
Other (section 2.5.9 of the assessment grid):	-Not Applicable-

Expert 6: Gender Expert with International Experience (section 2.6 of the assessment grid)

This position is a key expert.

The Gender Expert shall be responsible for leading the gender-disaggregated data study and supporting the development/strengthening of gender-responsive workplace policies and institutional processes across industrial clusters.

Tasks of expert 6

- Develop a standardized gender-disaggregated data framework and indicators aligned with project objectives.
- Capture workforce composition, roles, employment types, wages, leadership representation, and participation in energy and sustainability initiatives.
- Support industries and cluster associations in data collection, ensuring accuracy, consistency, and confidentiality.
- Identify gaps in existing workplace systems and contribute to the development and/or strengthening of gender-responsive workplace policies and institutional processes.
- Compile, validate, and analyze data to identify gender gaps and trends.
- Prepare summary reports and recommend measures to institutionalize regular gender-disaggregated reporting.
- Support dissemination of findings to promote uptake of gender-responsive practices and policies.

Qualifications of expert 6.

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Education/training (section 2.6.1 of the assessment grid):	PhD or Master's degree in Gender Studies, Social Sciences, Development Studies, Public Policy.
Language (section 2.6.2 of the assessment grid):	-Not Applicable-
General professional experience (section 2.6.3 of the assessment grid):	7 years of professional experience working in the fields of gender equality, gender mainstreaming or social inclusion
Specific professional experience (section 2.6.4 of the assessment grid):	3 years of demonstrated experience in - designing and implementing gender-disaggregated data systems, surveys, and analytical frameworks (5 out of 10 points), and - the development, assessment, or strengthening of gender-responsive workplace policies, institutional systems or inclusive practices (5 out of 10 points)
Leadership/management experience (section 2.6.5 of the assessment grid):	-Not Applicable-
International professional experience outside the country/region of assignment (section 2.6.6 of the assessment grid):	3 years of professional experience outside of India
Professional experience in the country/ region of assignment (2.6.7 of the assessment grid):	4 years of professional experience in Indian industries
Experience in the field of development cooperation (section 2.6.8 of the assessment grid):	-Not Applicable-
Other (section 2.6.9 of the assessment grid):	-Not Applicable-

Expert 7: Expert Pool 1 Technical experts (3) with International Experience (section 2.7 of the assessment grid)

Three (3) CVs must be added to the tender. The ability of the tenderer to offer the pool of experts required here is assessed solely on the basis of these CVs.

The Pool of Experts comprises specialists in industrial decarbonisation, clean and energy-efficient technologies, CBAM compliance, ESG integration, capacity development, and gender-responsive approaches. Working collaboratively, they will strengthen technical capacities of industry stakeholders and policymakers while enhancing the relevance and effectiveness of sectoral decarbonisation strategies. Their key responsibilities include conducting sector-specific assessments, developing and delivering technical training modules,

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advising on CBAM and ESG alignment, and undertaking policy and programme reviews to generate actionable, industry-relevant recommendations. By integrating best practices and ensuring contextual applicability, the experts will provide specialised inputs to support pilot implementation, replication frameworks, and alignment with national and international decarbonisation objectives.

Tasks of Expert Pool 1

- Conduct sector-specific technical assessments of industrial technologies.
- Identify innovative and low-carbon technologies applicable in Indian context.
- Perform techno-economic and financial viability analysis.
- Estimate emissions reduction potential and scalability.
- Support development of decarbonisation roadmaps for industries.
- Provide technical inputs to CBAM-aligned methodology.
- Assist in pilot implementation and troubleshooting.
- Contribute to sectoral replication and upscaling frameworks.
- Participate in stakeholder consultations and technical workshops.
- Contribute to preparation of knowledge products and case studies.

Qualifications of Expert Pool 1

Education/training (section 2.7.1 of the assessment grid):	University degree (Master's or Post Graduate Diploma) in Engineering, Energy, Environment, Climate Policy, Economics or sustainability studies.
Language (section 2.7.2 of the assessment grid):	-Not Applicable-
General professional experience (section 2.7.3 of the assessment grid):	7 years of professional experience in the field of energy efficiency, industrial processes or technology analysis
Specific professional experience (section 2.7.4 of the assessment grid):	3 years of professional experience working in energy audits
Leadership/management experience (section 2.7.5 of the assessment grid):	-Not Applicable-
International professional experience outside the country/region of assignment (section 2.7.6 of the assessment grid):	2 years of professional experience outside of India
Professional experience in the country/ region of assignment (2.7.7 of the assessment grid):	5 years of professional experience working in India

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Experience in the field of development cooperation (section 2.7.8 of the assessment grid):	-Not Applicable-
Other (section 2.7.9 of the assessment grid):	-Not Applicable-

Expert 8: Expert Pool 2 Gender experts (6) with International Experience (section 2.8 of the assessment grid)

In derogation from the number of 6 experts mentioned above, **three (3)** CVs must be added to the tender. The ability of the tenderer to offer the pool of experts required here is assessed solely on the basis of these exemplary CVs.

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

Tasks of Expert Pool 2

- Policy Review and Gap Assessment
- Policy Development and Strengthening
- Capacity Building and Sensitisation
- Action Planning and Institutionalisation
- Monitoring and Reporting
- Design and implementation of gender-disaggregated data collection processes.
- Collect, compile, clean, and analyse industry data; prepare summaries and analytical inputs.
- Coordinate with industry stakeholders and support organisation of meetings, consultations, and capacity-building workshops.

Qualifications of Expert Pool 2.

Education/training (section 2.8.1 of the assessment grid):	Bachelor's or master's degree in Gender Studies, Social Sciences, Development Studies or Public Policy.
Language (section 2.8.2 of the assessment grid):	-Not Applicable-
General professional experience (section 2.8.3 of the assessment grid):	7 years of professional experience in gender equality, gender mainstreaming, or policy development.

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Specific professional experience (section 2.8.4 of the assessment grid):	• 4 years of experience in gender data collection, aggregation and analysis. (5 out of 10 points) • 5 years of demonstrated experience in reviewing and strengthening organisational gender policies (e.g., workplace equality, diversity and inclusion, Prevention of Sexual Harassment, equal opportunity policies) in the Indian context (5 out of 10 points)
Leadership/management experience (section 2.8.5 of the assessment grid):	-Not Applicable-
International professional experience outside the country/region of assignment (section 2.8.6 of the assessment grid):	2 years of professional experience outside of India
Professional experience in the country/ region of assignment (2.8.7 of the assessment grid):	3 years of professional experience in Indian industrial MSME sector
Experience in the field of development cooperation (section 2.8.8 of the assessment grid):	-Not Applicable-
Other (section 2.8.9 of the assessment grid):	-Not Applicable-

Expert 9: Expert Pool 3 of Communication experts (2) with International Experience

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.

The Pool of Expert will lead stakeholder engagement, outreach, and dissemination activities to support effective implementation and visibility of the programme. The expert will be responsible for developing and implementing communication and stakeholder engagement strategies, designing industry outreach campaigns, and preparing workshop/training programmes materials, presentations, policy briefs, infographics, and digital content. The role will also include organising and facilitating workshops/training programmes, consultations, peer-learning exchanges, and dissemination events. In addition, the expert will document case studies, best practices, and success stories to support knowledge sharing and replication, coordinate logistics for training and dissemination activities, and contribute to the preparation of periodic progress reports and final project documentation.

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Tasks of Expert Pool 3

- Develop and implement stakeholder engagement and communication strategy.
- Design outreach campaigns for industry participation.
- Prepare workshops/training programmes materials, presentations, and knowledge briefs.
- Organise and facilitate dissemination workshops/training programmes and consultations.
- Document case studies, best practices, and success stories.
- Ensure visibility in compliance with GIZ/BMZ communication standards.
- Develop infographics, policy briefs, and digital content.
- Support preparation of periodic and final reports.
- Facilitate industry-industry peer learning exchanges.
- Coordinate logistics for training and dissemination events.

Qualifications of Expert Pool 3

Education/training:	University degree (Master's or Post Graduate Diploma) in Communications/Journalism/Public Policy
Language:	-Not Applicable-
General professional experience:	5 years of professional experience in communication, international conferences or stakeholder consultations
Specific professional experience:	3 years of professional experience with Indian industrial energy sectors, regulatory frameworks, and national initiatives.
Leadership/management experience:	2 years of professional experience in managing Partnership/outreach management
International professional experience outside the country/region of assignment:	1 year of professional experience outside of India
Professional experience in the country/ region of assignment	-Not Applicable-
Experience in the field of development cooperation:	3 years of experience in development cooperation projects
Other:	2 years of experience in preparing programme proceedings

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.

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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.

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)	Number of international flights	Number of national flights

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Expert 1: Team Leader with International Experience	115	30	145	No	6	20
Expert 2: Energy Auditor (EA) with International Experience	70	185	255	No	15	40
Expert 3: IT Tool Expert with International Experience	15	20	35	No	3	10
Expert 4: CBAM Expert with International Experience	23	30	53	No	3	20
Expert 5: ESG Expert with International Experience	13	20	33	No	3	10
Expert 6: Gender Expert with International Experience	25	149	174	No	2	20
Expert 7: Expert Pool 1 Technical experts (3) with International Experience	70	423	493	No	25	65
Expert 8: Expert Pool 2 Gender experts (6) with International Experience	50	303	353	No	12	35
Expert 9: Expert Pool 3 of Communication experts (2) with International Experience	20	108	128	No	4	20

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Backstopping	Not applicable	Not applicable	Not applicable			
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5.2 National administrative staff

– Not applicable –

5.3 Travel expenses

5.3.1 Travel – sustainability considerations

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

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

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

5.3.2 Travel expense requirements

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

Travel expenses item	Quantity/budget
Total number of international flights	73 international flights
Total number of regional/national flights	240 regional/national flights
CO ₂ offsets for flights	EUR 9,535.00 (Domestic and International Flights) An unalterable budget for CO ₂ offsets for settlement against evidence is specified.

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Transport costs (rail travel, car travel, public transport)	150 transports
Per-diem allowances	1268 days
Accommodation allowances	1195 days
Visa acquisition costs (17 experts, 2 visas via expert)	EUR 3,740.00

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 (download at <https://www.bundesfinanzministerium.de>).

In addition, for the following items, reasonable costs can be settled against evidence up to the proposed amount/ the maximum amount set out in the price schedule.

- Flight costs
- Transport costs
- Other travel expenses

Notes on the settlement of accommodation allowances outside Germany:

For the country India, tenderers may offer accommodation allowances up to EUR 85.00 This is the maximum amount permissible under tax law as per the BMF circular on travel expense reimbursement.

- If the contractor offers accommodation allowances at up to 75% (EUR 63.75) of the maximum amounts permissible under tax law as per the BMF circular on travel expense reimbursement, the expenses will be reimbursed **on a lump-sum basis** in the contractually agreed amount.
- If the contractor offers accommodation allowances at between 75% and 100% (EUR between EUR 63.76 and EUR 85.00) of the maximum amounts permissible under tax law as per the BMF circular on travel expense reimbursement, the corresponding **evidenced expenses** will be reimbursed up to the contractually agreed amount.

Accommodation allowances outside Germany that exceed the maximum amount permissible under tax law as stipulated by BMF and were unavoidable (e.g. due to security requirements) can be settled exclusively on presentation of a written justification of the specific case for the evidenced costs up to the contractually agreed amount.

5.4 Materials and equipment

– Not applicable –

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5.5 Operating costs in the country of assignment

– Not applicable –

5.6 Workshops, education and training

The contractor runs the following workshops/study trips/training courses:

- Total 20 training programmes each on ESG, CBAM & product level carbon accounting tools
- Total 50 workshops on Pilots and Dissemination
- 35 workshops on Gender related activities mention in WPB

Workshop/training programmes budget: EUR 105,000

The fixed, unalterable budget above is earmarked for workshops/training programmes and entered in the price schedule. The budget includes the following costs relating to the planning and running of workshops/training programmes:

- Room hire
- Technical systems
- Catering
- Workshops/training programmes materials
- Travel expenses for contractor (subsistence, accommodation, travel costs)
- Other costs relating to the workshops/training programmes

The budget does not include the fees and travel expenses for the contractor's experts incurred in connection with the planning and running of the workshops/training programmes. These are covered by the corresponding number of expert days and travel expenses (see sections 5.1 and 5.3 above).

5.7 Local contributions

– Not applicable –

5.8 Other costs

A budget of 460.00 EUR is foreseen for the IT Tool deployment, i.e. for licensing if applicable and paid against evidence.

5.9 Flexible remuneration item

EUR 99,969.00

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

6. Requirements on the format of the tender

The structure of the tender must correspond with the structure of the ToRs. It must be legible (for example Arial, font size 11 or larger) and clearly formulated. The technical tender must be written in English.

The technical-methodological concept of the tender (section 3 of the ToRs) must not exceed 25 pages (not including the cover page, list of abbreviations, table of contents, brief introduction and CVs incl. 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 three pages in length. The CVs can also 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.

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7. Options or follow-on contract

7.1 Option to expand the service content/extend the contract term pursuant to section 132 (2) no. 1 German Act against Restraints of Competition (GWB)

GIZ can exercise the following option if it wishes to expand the tendered services. This is described in detail below.

Nature and scope:

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 or an agreement is concluded to provide cofinancing for the measure.

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

Nature and scope:

GIZ may increase the total budget of the contract for the procurement of materials and equipment. After the exact needs and technical specifications for the equipment have been defined with GIZ, it is foreseen to add an additional budget for the procurement of the following goods: 10 technologies. The materials and equipment are required to fulfil Work Package A4 of this contract, specifically the piloting of selected 10 technologies for subsequent upscaling. The technologies will be proposed by the contractor and need to fulfil energy-efficiency criteria to achieve a minimum of 10% energy savings in participating industries.

Maximum budget for the procurement of these materials and equipment: EUR 181,800.

Preconditions:

All 10 technologies need to be fully identified and proposed to start the procurement. For this, a description of each technology including, but not limited to:

- Technology specifications
- Potential manufacturers

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- Applicable sector

The cost settlement is based on submission of documentary evidence.

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

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

Scope of possible services:

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

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

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

8. Annexes

- Annexure 1: ADEETIE Sectors & Clusters