

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

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Consulting Services for Fostering a Just Transition in the Mexican Industrial Sector

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0. List of abbreviations

AMPIP	Mexican Association of Private Industrial Parks
BESS	Battery Energy Storage Systems
CAPEX	Capital Expenditures
CFE	Federal Electricity Commission – Mexico
CV	Curriculum Vitae
GDPR	General Data Protection Regulation (EU)
GHG	Green House Gas Emissions
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH
GTC	General Terms and Conditions of Contract for supplying services and work on behalf of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
IEA	International Energy Agency
IRENA	International Renewable Energy Agency
KOMP	Cost per output monitoring and forecast
KT	Standard Indicator
LoI	Letter of intent
MACC	Marginal Abatement Cost Curve
MoU	Memorandum of Understanding
MTCO _{2e}	Mega Tons of Carbon Dioxide (equivalent, whenever an -e is added)
NDC	Nationally Determined Contributions to the Paris Agreement
OPEX	Operational Expenditures
RENAC	Renewables Academy AC - Germany
RMO	Risk Management Office
SE	Ministry of Economy – Mexico
SEMARNAT	Ministry of Environment and Natural Resources – Mexico
SENER	Ministry of Energy – Mexico
ToRs	Terms of reference
UNIDO	United Nations Industrial Development Organization
WP	Work package

1. Context

The industrial sector is both a major source of Mexico's economic development and most significant sources of greenhouse gas (GHG) emissions. According to Mexico's Nationally Determined Contribution (NDC), in 2022 emissions associated to industrial processes and product use represented 9.6% of the total national emissions (non-considering absorptions), while the energy sector accounted for 63.4% respectively. To meet its enhanced climate ambition, Mexico has committed to an unconditional reduction of 35% of GHG emissions by 2030, and up to 40% conditionally. Achieving these targets requires a profound transformation of high-emitting sectors, with industry and a wider deployment of clean energy identified as key areas for targeted decarbonization.

Recent global analyses underscore the pivotal role of energy transition and industrial decarbonization in achieving climate targets. The United Nations Industrial Development Organization (UNIDO) emphasizes that transforming high-emitting industries (such as steel, cement, and chemicals) is essential to reaching net-zero emissions by 2050. UNIDO (2024) highlights that sustainable industrialization not only mitigates climate change but also drives inclusive economic growth and employment, with every manufacturing job generating more than two additional jobs in related sectors. These findings suggest that strategic decarbonization can deliver significant environmental and socio-economic benefits.

Sectoral decarbonization transitions must be socially inclusive and environmentally sustainable. A just transition approach ensures that climate mitigation strategies protect people, reduce inequalities, and generate socio-environmental co-benefits, particularly for local communities and vulnerable populations who may be disproportionately affected by structural shifts.

Operationalizing this vision in Mexico means embedding these principles in the country's emissions-intensive, industrial and energy sectors and industrial parks, where climate action and local development intersect, and where better data, social metrics, and coordinated planning are essential.

Despite this growing ambition, Mexico faces persistent challenges: limited disaggregated data on emissions from industrial parks, insufficient integration of equity considerations in mitigation planning, and a lack of adequate tools for coordinated policy development at the subnational level. Addressing these gaps requires specialized technical analysis and participatory planning mechanisms capable of aligning climate objectives with inclusive industrial policy.

In this context, industrial parks offer both challenges and opportunities for **advancing effective industrial decarbonization under a just transition approach**. Industrial parks in Mexico are central to the country's industrialization process and are increasingly recognized as strategic nodes for implementing industrial and climate policy. These parks are critical nodes within Mexico's industrial economy, and their expansion is accelerating due to global supply chain realignments and increased foreign investment. As of February 2023, the Mexican Association of Private Industrial Parks (AMPIP) reported 431 operational parks, with 72 additional parks projected for construction by 2024 across strategic corridors such as the AIFA, Bajío, Pacific, Gulf of California, North, and Isthmus of Tehuantepec. By 2025, energy demand from these developments is expected to grow by 25%, driven by expansion in information technology, logistics, and light manufacturing.

At the national level, the Government of Mexico is promoting an integrated industrial and energy policy with a strong focus on social well-being and shared prosperity, aligned with the

principles of energy justice and inclusive decarbonization. The *Plan México*, a guiding framework for industrial policy, seeks to territorialize industrial development by promoting environmental sustainability, creating "well-being hubs," and enabling the construction of up to 100 new industrial parks. Notably, the Ministry of Economy has launched the *Corredores del Bienestar* (Well-being Corridors), an initiative aimed at fostering regional economic development through the creation of strategic corridors that connect regions with distinct economic specializations. These efforts are implemented in coordination with state governments, the federal administration, and private sector actors.

Within this framework, the project Supporting a Just Transition in Mexico, implemented by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, seeks to empower public and private actors to advance a just transition in priority sectors of the Mexican economy, namely industry and energy. The project is structured around four pillars: participatory governance, the promotion of green technologies and employment, socio-environmental and gender justice, and the design of innovative financial instruments.

In line with this approach, the technical focus of this consultancy is low-carbon industrial transformation. For the purpose of this assignment, low-carbon industrial transformation refers to structural transformation processes that support the transition of industrial and energy sectors towards low-emission development pathways through technological innovation, the deployment of low-carbon technologies, improved resource and energy efficiency, and sustainable production models. Such processes contribute to climate change mitigation while integrating environmental and social safeguards and promoting a just transition through stakeholder participation, equitable outcomes for affected groups, and the creation of sustainable economic opportunities.

This consultancy forms part of those efforts and is structured around **four main service work packages**:

- **Technical advice** and support to develop specialized analysis related to the implementation of a Just Transition in Industrial Parks, the Industry and Energy sectors in Mexico.
- **Assessment** of Mitigation Potential and Decarbonization Pathways for Industrial Parks in Mexico under a Just Transition approach.
- **Strategic communication** and narrative development for a Just Transition.
- Structured **Capacity Building** formats for key stakeholders in the context of a Just Transition in Mexico.

The **primary target groups of the consultancy** include *energy and industry key actors* and *industrial park operators*, state-level economic and environmental authorities, and federal policy institutions. Secondary target groups include affected communities, labour representatives, civil society organizations, and academic institutions.

The **results hypothesis** is that high-quality, context-sensitive analyses, when combined with inclusive stakeholder engagement, will strengthen the capacity of public and private actors to design and implement effective, equitable decarbonization measures aligned with national climate goals and that facilitates the implementation of a just transition in Mexico.

The consultancy will apply a **mixed-methods approach** combining quantitative modelling (e.g., emission baselines and mitigation scenarios) with high-level qualitative analysis (e.g., policy mapping, institutional analysis, multi-stakeholder methodologies and formats, case studies). Stakeholder consultations and participatory workshops will ensure that results are

grounded in territorial realities and aligned with just transition principles. Co-benefits, uncertainty ranges, and material footprints will also be analysed to inform cost-effective and inclusive decision-making. Specialized analyses in economics, econometrics, legal frameworks, and industrial competitiveness will be required to support evidence-based recommendations.

The consultancy will be supervised by GIZ and is intended to inform evidence-based decision-making and policy development in support of Mexico's climate and development goals—ensuring that decarbonization efforts are equitable, inclusive, and sustainable.

The implementation of a just transition in Mexico's energy and industrial sector demands more than technological change; it requires a systemic, participatory approach informed by both international and domestic experience. In a country where industrial activity is highly concentrated in specific regions, industrial parks offer a practical and strategic entry point to operationalize the just transition agenda. Mobilizing specialized technical analysis rooted in international best practices and national learning is therefore essential to designing context-sensitive transformation strategies that anticipate socio-economic impacts, identify opportunities for green employment, and ensure that climate action supports sustainable regional development.

To support this objective, the project is actively building cooperation with key national and international stakeholders. At the international level, partnerships are being developed with the United Nations Industrial Development Organization (UNIDO), both globally and through its Mexico office, to leverage technical expertise and align with cutting-edge practices in industrial decarbonization. Nationally, the project is engaging with the Mexican Association of State Economic Development Authorities (AMSDE) and the National Association of State Environmental Authorities (ANAAE), representing Mexico's 32 state-level environmental institutions. Collaboration with the Mexican Association of Private Industrial Parks (AMPIP) is also advancing, alongside dialogue with industry chambers, federal authorities, civil society organizations, and the academic sector. These cooperation arrangements provide a foundation for conducting comprehensive technical analyses and for co-designing strategies aligned with Mexico's NDC commitments and its broader agenda for sustainable, inclusive development.

Just transitions are critical enablers for Mexico to decouple economic growth from emissions trends, ensuring that climate action goes hand in hand with social inclusion and sustainable development. This principle shall guide all technical cooperation efforts aimed at supporting the country's low-carbon transformation. Achieving this objective requires sustained and coordinated dialogue among the energy, economic, and environmental sectors across multiple levels of governance. The concept of just transition also recognizes that energy and industrial transformations are not purely technical processes, but socio-technical in nature, with profound implications for labour markets, gender dynamics, community well-being, and territorial cohesion. As such, the project places particular emphasis on assessing these dimensions and translating principles such as energy justice into **actionable strategies**. This consultancy constitutes a key component of Mexico's broader efforts to implement a just transition, offering high-level, non-experimental technical support grounded in international cooperation, interdisciplinary analysis, and inclusive policy design.

1.1 Objectives, indicators, work packages, milestones

Through this assignment, the contractor helps bring about the Project's outcome: relevant stakeholders can implement a Just Transition in selected sectors of the Mexican economy. In practical terms, the contractor's work (primarily via WP2 and with support from WP1/3/4) **contributes** to Outcome indicator 0.2 by facilitating investment planning and commitments from at least 2 of 10 industrial parks and 25 of 100 companies to deliver ~10% GHG reductions versus BAU. The contractor also advances in Standard Indicator (KT) 4.1 by establishing baselines and MRV arrangements and coordinating actors so emission reductions can be credibly tracked. At the outcome level, the contractor's contribution represents 20% of the module weighting. The specific indicators, related work packages, and milestones are summarized in the results framework table below.

Level	Objective/ output	Indicators	% KOMP	Role*	Linked WP
Outcome	Stakeholders capable of implementing a Just Transition	0.2: 2/10 industrial parks and 25/100 companies invest to reduce GHG by 10% vs BAU. KT 4.1: tCO ₂ e/year reduced/avoided. **	20	Contribute to 0.2 by pipeline facilitation, investment planning support and MRV templates; and to KT 4.1 via baselines and tracking	WP2 (lead institution), WP1/3/4 (support)
Output 1	A participatory, climate, social and gender-effective governance framework for Just Transition is developed	1.1: 5 climate-effective, socially and gender-equitable regulatory instruments incl. recommendations for participatory multi-stakeholder dialogue formats available to mandated decision-makers.	20	Partial contribution to Output 1; Direct delivery of selected milestones under WP1/3/4	WP1, WP3, WP4
Output 2	Key actors can meet requirements and adopt green technologies more effectively	2.1: 3/10 parks and 50/100 companies have systematically developed a plan to invest in green technologies. 2.2: 200 persons (≥50% women/other vulnerable groups) demonstrate qualification to implement green technologies using a concrete example.	20	Partial contribution; Direct delivery of training and competency assessment milestones under WP3; Support to planning under WP2/WP4.	WP1, WP3, WP4
Output 3	Relevant financial institutions increase market-oriented financing offers for selected sectors.	3.1: 50/70 authority and financial institutions representatives show, via a specific example, improved ability to finance green tech in demand. 3.2: 6 new/enhanced instruments aligned with market needs	20	Partial contribution; Direct delivery of capacity-building and structuring support milestones under WP4.	WP4, WP3
Output 4	A subnational strategy for social and gender justice is implemented for the Just Transition of selected sectors.	4.1: 50/100 companies confirm receipt of Strategy recommendations reflected in corporate strategy. 4.2: Mandated decision-makers introduce a funding mechanism to implement Strategy recommendations.	20	Partial contribution; Direct delivery of outreach, integration and mechanism-design support milestones under WP4.	WP4, WP1

* Lead/Direct delivery" = contractor is accountable for the milestone/deliverable. "Contribute/Support" = contractor facilitates/enables.

** BAU baselines and MRV templates established under WP2 (see below) serve KT 4.1 tracking.

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

Scope and integration. This contract comprises two complementary branches: (i) the provision of **on-demand services** through a draw-down procedure, and (ii) the **delivery of defined milestones** (Work Package 2) as part of an integrated set of work packages (WPs). Completion of any element within a given WP is inherently related to, and will feed into, activities under other WPs. In particular, the milestone under WP2 will generate a shared analytical base (baselines, MACCs, scenarios, policy insights) that enables and informs subsequent tasks across the remaining WPs. Therefore, implementation across both branches shall be planned and executed as a coherent entity, not as isolated line items. Draw-downs will be issued within the approved work plan and critical path, and each draw-down must demonstrably contribute to the agreed milestones and the overall objective of this contract.

The contractor is expected to deliver services specified in the Work Packages depicted below. The specification of Work Packages provides an outline of the main lines of service that may be requested according to the best available knowledge as of today. As GIZ is flexibly reacting on individual partner requests and calls for proposals, it is not possible at this stage to determine the number of requests or focal institutions for the different activities upfront, nor to provide a detailed and exhaustive list of tasks and deliverables. **Therefore, the Work Packages present a guiding framework for the potential work to be implemented and should thus be taken as indicative.** The activities included in the work packages don't have to be carried out in sequence. Several activities can be carried out simultaneously. The contractor is expected to provide sufficient adaptability for adjusting the work plan and scope of activities as necessary to meet the specific support needs of GIZ and its partners. To meet emerging support needs in an agile manner, the contractor shall work in close coordination and consultation with GIZ. Hence, the proposed experts must be capable of responding to changes flexibly and are expected to promote change processes jointly with GIZ.

The following section illustrates the process leading to the implementation of a new task. If necessary, this approach may be adjusted by GIZ in consultation with the contractor during the assignment period.

1. GIZ, through the project "Supporting a Just Transition in Mexico, will inform the contractor about the upcoming scope of the task, including information and procedures related to the task, as well as upcoming deadlines or reporting requirements.
2. Through an iterative process, GIZ and the contractor work together to clarify and agree on the exact scope of work for the task. This includes breaking down the expected expert-days for each activity and deliverable, forming the basis for invoicing upon completion.
3. GIZ and the contractor agree on the assignment of experts from the expert pools (Experts 3 and 4) for task management and implementation, with clear roles and responsibilities defined for each expert.

4. If the task requires the involvement of additional experts outside of the defined expert pools due to requirements, the contractor shall identify suitable specialists in consultation with GIZ. Further, GIZ may recommend experts to be added to the expert pools. The added experts must meet the human resources concept defined for the original tender. The assignment of each additional expert must be confirmed by GIZ in writing.
5. The experts involved are expected to initiate task implementation right away, unless otherwise agreed.
6. Throughout the task implementation, the contractor maintains regular exchange and coordination with GIZ for quality control. Inputs, intermediate outputs, and final deliverables are frequently presented to GIZ and its partners for discussion and approval.
7. GIZ confirms the successful completion of each task and its milestones, if applicable.
8. Reporting requirements between contractor and GIZ are defined in chapter 2.3.

2.2.1 Work package 1: Technical advice and support to develop specialized analyses related to the implementation of a Just Transition in Industrial Parks and the Industry Sector in Mexico.

This work package includes parts of Outputs 1, 2, 3 and 4. During the contracting period the key activities are to support GIZ with specific expert technical services as per demand. GIZ will provide all additional input and/or specifications to fulfil the activities required to achieve each output indicators.

The **objective** of this work package is to provide expert technical services to support a just transition in Mexico's industrial parks and the broader industrial sector, including the energy sector¹. This includes the following key activities:

- Organise, facilitate and /or participate in expert **dialogue formats** between key players and among various sectors related to the Mexican Just Transition processes. These dialogues shall consider a collaborative and participative approach in fostering the exchange of good practices, lessons learnt and practical/knowledge facilitation from international or regional experiences to the Mexican context.
- Prepare **customized training material**, including presentations, brochures, concept notes, factsheets, briefings, or any other format required for activities to be developed that align with the specific target audience and adapt to the national and subnational context in Mexico.
- Provide **high-level technical and business advice** for Federal, state-level, and Local authorities in Mexico, key industry players and subsector representatives (chambers, associations, etc), industrial parks representatives and associations, civil society and academy, unions, on various aspects of the Just transition processes in Mexico for the industry and energy sector, including a strong technological and financial aspect for its implementation, as well as comprehensive policy analysis to assess its feasibility, requirements and areas for improvement and harmonization.

¹ For the purposes of these Terms of Reference, the energy sector is here referred to renewable energy and energy efficiency value chains and could be related to other developing markets such as green hydrogen.

- Assist federal and subnational authorities in **integrating just transition criteria and actions into broader climate, economic and industrial policy strategies** for a coherent and comprehensive approach.
- Produce **technical documents or other specialized inputs (reports, studies, factsheets, or other technical guidance documents)** that include specific recommendations and analysis for the target audience on various aspects of a Just Transition. For the preparation of these inputs, the consultant team shall agree with GIZ on scope and format. These documents shall mobilize both international and national experience, and offer in-depth analysis and evidence-based recommendations, further enriching a practical guidance which could provide key actors with a solid foundation for informed decision-making and successful implementation of a Just Transition process in Mexico.
- Participate in meetings, workshops, or other events to share experiences, facilitate discussions, and engage into active results-oriented events regarding the Mexican Just Transition process.
- Provide **peer-to-peer advisory services** to industry representatives, financial institutions, public authorities, and non-governmental actors, fostering the exchange of knowledge and lessons learned from successful just transition processes implemented in industrial, energy, and industrial park ecosystems (in particular Eco-Industrial Parks Framework) in other countries.

The scope of work is structured around **eight thematic areas**:

- (1) Governance frameworks for a just transition;
- (2) Enabling business conditions for the adoption of green technologies in the industrial sector;
- (3) Financing mechanisms to support the uptake of green technologies;
- (4) Social justice and gender considerations within the framework of a just transition;
- (5) Circular economy;
- (6) Clean energy vectors;
- (7) Green materials; and
- (8) Subnational Just Transition approaches.

Potential activities to be carried out under this work package include, but are not limited to, the following:

Governance for a just transition

- Specialized technical advice to public actors on policies, strategies and programs in the field of Just Transition, with a focus on the energy sector.
- Analysis and development of **regulatory instruments that encourage the decarbonization of Mexico's industrial sector**. This can take different formats (roadmaps, regulatory improvement analysis, proposals for legislative initiatives, strategies, standards, etc).

Business conditions for the introduction of green technologies in the industrial sector

- Development of **investment plans in green technologies** for companies in the energy and industrial sectors and industrial parks.
- **Technical and financial feasibility analysis** on the introduction of green technologies in the energy industry, industrial park enterprises and industrial park management.

- **Alignment analysis of infrastructure and business management processes** with a Just Transition approach.
- Development of **qualification measures for service and product providers** for the industry, energy sector and industrial parks (e.g. renewable energy and energy efficiency markets, green hydrogen, cement, steel) aligned to a just transition approach.

Financing green technologies

- **Mapping of financing instruments** for the implementation and/or deployment of green technologies in selected subsectors of industry, energy sector (renewable energy and energy efficiency) and industrial parks.
- Specialized advice to the financial and business sector in Mexico on **demand-based financing options for green technologies**.
- Specialized technical advice on the ideation, cost-benefit analysis, and implementation routes of **financing instruments for green technologies** consistent with just transition approaches.
- Development of **information material** for companies in the energy sector, selected industrial sub-sectors and industrial parks on financial vehicle options for the promotion of green technologies under a just transition approach.

Social justice and gender in the framework of a Just Transition

- Development and/or assessment of **social justice and gender strategies** for just transition processes in the industrial and energy sector at the local level.
- **Analysis of socio-economic impacts of just transition processes** in the industrial, energy and industrial park sectors on labour markets in different subsectors at the local level (e.g. renewable energy and energy efficiency markets, green hydrogen, cement, steel, among others).
- Assessment and development of strategies to mitigate negative socio-economic impacts and risks of just transition processes, **including those associated with industrial transformation towards climate neutrality**.

Circular Economy

- **Technical assessments of circular economy applications** in key industrial subsectors to identify decarbonization co-benefits.
- Development of **circular economy roadmaps** for industrial parks, focused on resource efficiency, waste valorisation, and industrial symbiosis including energy flows, among other potential activities.
- Design of **pilot projects for implementing circular practices** within industrial parks.
- Support for the **development of enabling policies and regulatory instruments** for circularity in the industrial sector.

Clean Energy Vectors: Renewable Energy, Renewable Hydrogen and rare materials

- Identification of **opportunities for deploying clean energy solutions** (such as solar PV, wind, biomass, geothermal (diverse uses), and low emission hydrogen, battery energy storage systems (BESS) within industrial parks or through shared infrastructure models, aligned to the Mexican energy regulatory framework.
- **Strategic advisory** to national actors (SENER, CFE, LítioMx) for the deployment of renewable energy technologies for the industrial sector, within industrial parks, or

aligned with large-scale federal energy initiatives including integration with industrial policy and decarbonization objectives.

- **Mapping of hydrogen and lithium value chains** in Mexico, with attention to social and environmental safeguards.
- Development of **business models and public-private partnerships** to scale renewable energy and green hydrogen investments, particularly in hard-to-abate sectors (e.g., steel, cement, chemical industry).

Green Materials (Green Cement, Iron/Steel, Rare materials)

- Technical studies on low-carbon production technologies and process improvements for the cement and iron and steel industries in Mexico.
- Development of **policy recommendations and regulatory incentives** to promote the adoption of green construction materials in industrial infrastructure.
- Analysis of **supply chains and market readiness for green materials**, including potential for subnational clusters and public procurement strategies.
- Case studies on green cement or steel production.
- Assessment of socio-environmental implications of lithium extraction and hydrogen rollout, considering just transition principles such as community engagement, fair benefit distribution, and gender equity.
- Preparation of technical guidelines and policy recommendations for the responsible governance of hydrogen and lithium (and potentially other critical raw materials), aligned with international best practices and sustainability standards.

Subnational Just Transition Approaches

- Diagnostic studies to assess regional vulnerabilities and opportunities associated with energy and industrial transitions at the subnational level.
- Co-development of just transition strategies with local governments, integrating regional economic planning, workforce development, and climate objectives.
- Multi-stakeholder dialogues and territorial roundtables to build consensus around just transition roadmaps for selected regions.
- Mapping of subnational policies and programs (existing or under development) that intersect with just transition priorities.
- Capacity-building activities for subnational authorities on designing and financing inclusive transition processes in their jurisdictions.
- Advisory services to subnational authorities on incorporating renewable energy and hydrogen deployment into regional industrial development and planning strategies.

Milestones for work package 1	Delivery period
Develop a work plan together with GIZ, incl. management formats.	Four weeks after the start of the contract
Concepts, documents, analyses, studies, documentation or similar technical, legal, financial, or training products resulting from service requests from GIZ, including annexes and evidence such as attendance lists, notes, minutes, travel logs, presentation and/or other evidence as appropriate.	From project start to the ending of the contract period
Partial achievement of indicators Report	Six months after the beginning of the contract

Milestones for work package 1	Delivery period
	Subsequent report shall be presented each six months until the end of the contract period.
Final achievement of indicators Report	One month prior to the end of the contract period

2.2.2 Work package 2: Assessment of Mitigation Potential and Decarbonization Pathways for Industrial Parks in Mexico under a Just Transition approach.

This work package is part of the Project's outcome module indicator 0.2 and indicator KT 4.1.

The second Work package aims to develop a **comprehensive and technically robust analysis that identifies and quantifies the greenhouse gas (GHG) mitigation potential of green technologies in selected industrial subsectors, energy-related applications (renewable energy and energy efficiency), in a selected number of Mexican industrial parks as a core unit of analysis** (to be defined by GIZ). The study will support evidence-based policymaking and investment decisions by establishing emissions baselines, modelling alternative mitigation scenarios, and identifying critical pathways toward decarbonization under a just transition approach.

The assessment shall at least consider the following key components:

- **Best Practices and International Benchmarks:** Analyse international experiences in decarbonizing industrial parks, including international experiences literature. Provide insights into the integration of cross-sectoral sustainability measures and symbiotic infrastructure systems (e.g., energy-water-waste linkages). This first stage shall include an analysis of several methodologies used for analysing decarbonization trajectories in industrial parks in other countries.
- **Emissions Baseline Development (pilot baselines and replicable model):** The Consultant team will prepare GHG emissions baselines for up to three (3) pilot industrial parks, covering the most recent full year (or rolling 12 months), and deliver a reusable baseline modelling template for future parks. GIZ will provide all available information (e.g., audits, utility data, operator records); although the Consultant could be requested to run additional primary data collection, systematize provided inputs and, where necessary, request a minimum viable dataset from park administrators (electricity/fuels, on-site generation, major equipment, costs, basic activity proxies, etc). Where gaps persist, the Consultant team could apply conservative assumptions and nationally consistent default factors, fully documented. Baselines will quantify Scope 1 and Scope 2 per the GHG Protocol with brief socio-economic descriptors to reflect a just transition lens. Deliverables could consider concise baseline briefs per park, a replicable model (Python or other platforms) with user guide, toolkit, etc (to be agreed with GIZ). Uncertainties will be reported; confidentiality will be safeguarded.
- **Cost Curve and Technology Assessment:** Identify and evaluate green technologies relevant for industrial parks (e.g., energy-efficient machinery, solar PV, geothermal applications, bioenergy, energy storage, industrial heat pumps, green construction materials, electric mobility, infrastructure services such as centralized wastewater treatment systems, centralized air-conditioning). Develop a marginal abatement cost curve (MACC) to rank technologies based on mitigation potential and cost-effectiveness.

- **Scenario Modelling and Policy Mix Analysis:** Building on the baselines and MACCs, the Consultant will construct up to five (5) decarbonization scenarios for the pilot industrial park(s), reflecting different technology-uptake trajectories and combinations of policy and financing instruments (e.g., concessional credit lines/guarantees, tax incentives, standards, carbon-pricing proxies). Scenarios will quantify GHG outcomes (tCO₂e), CAPEX/OPEX and levelized abatement costs and, where material, account for embodied emissions in construction materials and lifecycle emissions of major infrastructure. The final scenario set (and any sensitivities on adoption rates, costs, and grid factors) will be agreed with GIZ during inception.

The modelling platform will be selected during inception following a short comparative benchmark analysis (e.g., LEAP, TIMES, or an equivalent fit-for-purpose tool). Minimum selection criteria could be: (i) transparency and replicability (shareable model files, inputs, equations/assumptions, and version control); (ii) ability to ingest Mexico-specific data and represent relevant subsectors at park level; (iii) explicit representation of policy and finance levers and integration of MACC inputs; (iv) capability to include lifecycle/embodied emissions or a documented workaround; and (v) licensing and usability that allow handover, basic training, and continued use by GIZ/partners. Deliverables include a concise policy-mix comparison note with KPIs and trade-offs, the calibrated model package with user guide, and a short handover for training purposes.

- Incorporate **uncertainty analysis** to capture potential variations in outcomes.
- **Assessment of Environmental and Social Co-benefits:** Identify and assess the environmental and social co-benefits of each mitigation scenario for the pilot sample, up to two industrial parks and a capped subset of 3–5 priority measures per park. The assessment could cover air-quality improvements, water savings, local employment, gender equity and community effects; report direct and indirect co-benefits; and disaggregate results by park and subsector where feasible. No primary community/household surveys are expected; methods, factors and uncertainties will be documented.
- **Critical Pathways for Decarbonization (park level approach):** The Consultant team will synthesize the baselines and scenarios to identify 2–3 viable decarbonization pathways at the industrial-park level focusing on shared infrastructure, utility arrangements, governance mechanisms, cluster interventions and enabling policies/finance rather than enterprise-specific plans (no firm-level audits are expected). Where helpful and data permit, the Consultant may include anonymized “enterprise archetype” models purely for illustration. Pathways will be prioritized by abatement potential, cost/bankability, implementation readiness, co-benefits and just transition safeguards, and aligned with Mexico’s NDC and sustainable industrial policy objectives.

A detailed **technical report** with baseline estimations, cost curves, scenario modelling results, and policy recommendations shall be prepared as key milestone. The analysis must include visual tools (for instance charts, infographics) illustrating mitigation pathways, emissions projections, and co-benefits, an Executive summary and at least three infographics for dissemination to stakeholders. A high-level policy brief summarizing key findings for decision-makers shall also be included. Data will rely primarily on sources facilitated by GIZ and partners; any targeted primary data collection (e.g., brief questionnaires to park

administrators/anchor firms) will occur only to close critical gaps, be agreed with GIZ during inception, and remain limited in scope. No community or household surveys are foreseen.

All analysis and recommendations will incorporate a **just transition perspective**, including gender and social inclusion lenses. The study will explore how mitigation actions can contribute not only to climate goals but also to inclusive, regionally balanced industrial development.

The study will be carried out by a specialized group of experts, with close coordination and quality assurance by GIZ. Stakeholder engagement will be promoted through targeted workshops or technical dialogues to validate assumptions and results that will be coordinated closely with GIZ.

Milestones for work package 2	Delivery period
Inception report and work plan	Four weeks after the beginning of the contract
International Benchmarks and Methodology Review	Six weeks after the beginning of the contract
Emissions Baseline analysis for selected parks/sectors	Twelve weeks after the beginning of the contract
Technology Mapping and MACC Developed	Four months after the beginning of the contract
Draft Technical Report Delivered, including: (i) Baseline results, (ii) MACC, (iii) Draft scenario designs, and (iv) Preliminary co-benefits. Includes at least one infographic and visual data tools. Reviewed with GIZ.	Six months after the beginning of the contract
Stakeholder Validation Workshop	Five weeks after the completion of the Draft Technical Report
Scenario Modelling and Policy Mix Analysis	Eight months after the beginning of the contract
Social and environmental co-benefits assessment disaggregated by sector/park	Nine months after the beginning of the contract
Presentation of Modelling Results with key partners	Two weeks after validation with GIZ
Final Technical Report Delivered	Eleven months after the beginning of the contract
High-Level Policy Brief Delivered	Eleven months after the beginning of the contract
Closing validation meeting	Four weeks after validation of the Final Technical Report

2.2.3 Work package 3: Strategic communication and narrative development for a Just Transition.

This work package includes parts of Outputs 1, 2, 3 and 4.

During the contracting period the key activities are to support GIZ with specific expert technical and communication services. GIZ will provide all additional input and/or specifications to fulfil the activities required to achieve each output indicator. The exact number, format and timing

of communication products to be developed under this work package will be defined jointly by GIZ and the contractor during implementation, based on project needs and available resources. The list below is indicative of the types of services that may be requested and does not imply the production of all formats described.

This third work package focuses on the **development and implementation of strategic communication actions to promote the technical content and outcomes of the project**, with a particular emphasis on advancing a just transition in Mexico. Communication efforts will be oriented toward advancing public understanding and support for key transformation processes related to industrial decarbonization, sustainable industrial parks, circular economy, among others.

The objective is to support and advise GIZ and its key partners on the establishment of a coherent narrative of the just transition in Mexico. This includes designing communication outputs that translate complex technical workstreams into accessible messages to diverse target audiences. The work package will include the development of audiovisual materials and other dissemination tools to support outreach, capacity-building, public engagement, and stakeholder mobilization efforts aligned with the project's outputs.

Additionally, the milestones of this work package will cover the implementation journey and impacts of the project's activities foreseen under this contract, highlighting other milestones achieved under Work Packages 1, 2, and 4.

Under this work package, the consulting team shall undertake, at a minimum, the following communication-related services:

- **Narrative development and testing:** Propose and validate communication narratives on the just transition in Mexico. This process will be informed by a communication strategy and audience profiles provided by GIZ Mexico and will include testing through surveys and/or focus groups.
- **Media dissemination strategy:** Develop a proposal for content dissemination formats and a message scheduling plan for social media and/or traditional media channels (message placement system).
- **Text drafting and editorial services:** Synthesize existing materials into new communication products in written form and provide proofreading and copyediting services.
- **Audiovisual content production**
 1. **Up to 15 Short videos** (maximum 5 minutes each), using footage from events, interviews, site visits, workshops, industrial parks, and other project-related activities. Includes script, editing, subtitles and final editing.
 2. **Up to 18 social media reel** (maximum 30 seconds each). Includes editing and adaptation to social media.
 3. **Up to 10 Animated Videos** (maximum 5 minutes each) using graphic design and 2D animation techniques to communicate technical concepts and project results. Includes storyboard, animation, editing and subtitles.
 4. **Up to 15 animated reels** (maximum 30 seconds each). Includes graphic animation and social media adaptation.
 5. **Up to 15 visual documentation pieces** (maximum 20 minutes each) for event summaries, workshop highlights, stakeholder interviews, testimonials, or other materials documenting project implementation and results. Includes filming, interviews, editing and post-production.

6. **Up to 15 Event coverage packages (1 day)**, to provide audiovisual coverage for selected project events, workshops, consultations, site visits and public outreach activities. Coverage may include photography, video recording and the preparation of visual documentation materials. The contractor may determine sub-contracting requirements to be approved by GIZ.

- **Graphic and editorial products**

1. **Up to 18 Infographics** that synthesize and visually interpret complex technical information, facilitating broader understanding. Includes digital infographic design.
2. **Up to 15 technical factsheets**, that includes design and layout of technical content.

The implementation and costing arrangements applicable to the audiovisual, graphic and editorial products described above are set out in section 2.2.3A.

2.2.3a Implementation of audiovisual content production

The Contractor shall handle the organizational, artistic and practical implementation of the production as prescribed in Annex 03c Audio/Video Production. The technical, quality, approval, delivery, copyright and rights of use requirements set out in Annex 03c form an integral part of these TOR and apply to all audiovisual production services, including those performed by approved subcontractors.

The Contractor shall also ensure compliance with the institutional communication, editorial and branding guidelines provided by GIZ, including the **institutional communication guidelines** of the project “Support for the Implementation of a Just Transition in Mexico”.

The Contractor shall prepare the corresponding production briefs and determine the appropriate subcontracting arrangements for each commissioned product, subject to prior approval by GIZ. The product types and quantities specified in section 2.2.3 constitute indicative maximum quantities. The precise combination, number, format and technical specifications of the products to be commissioned will be agreed between GIZ and the Contractor during implementation, based on project needs, the approved communication work plan and the available budget. The indicated quantities do not imply that all products or formats will be commissioned.

The fixed budget and cost requirements are shown in section 5.8.

Graphic and editorial products shall be delivered in both editable and publication ready formats and shall be subject to GIZ’s approval. All materials developed under this consultancy are expected to be suitable for dissemination across both public and private platforms. They should convey key technical information in a clear and visually engaging manner, elements that facilitate understanding of the core concepts of the Just Transition. Two design criteria are currently in use: one following GIZ’s corporate branding, and another for co-branded products developed in collaboration with key project counterparts. The corresponding design templates and branding guidelines will be shared with the contractor in due course.

Milestones for work package 3	Delivery period
Develop a communication work plan together with GIZ	Six weeks after the start of the contract

Editorial products, multimedia materials, audiovisual events coverage, factsheets, illustrations, advisory sessions, etc	During all the contracting period
Communication production reports	To be presented every six months
Final communication production report	One month prior to the end of the contracting period

2.2.4 Work package 4: Structured Capacity Building formats for key stakeholders in the context of a Just Transition in Mexico.

This work package also includes parts of Outputs 1, 2, 3 and 4. During the contracting period the key activities are to support GIZ with specific services as per demand. GIZ will provide all additional input and/or specifications to fulfil the activities required to achieve each output indicators.

This work package aims to design and implement structured capacity building components that strengthen the knowledge and technical skills of key stakeholders involved in the implementation of a Just Transition in Mexico. The objective is to provide capacity building activities, to be delivered through various modalities agreed upon with GIZ, focusing on the most relevant actors at the national and subnational levels, including public institutions, private sector, academia, and civil society organizations.

The consulting team shall deliver all services necessary to design, implement, and evaluate the training activities, with the following considerations:

- Capacity building activities may include online or in-person sessions, workshops, webinars, or modular training programs. The final format(s) and sequencing will be determined jointly with GIZ based on the specific profiles and needs of the target audience.
- Training shall be aligned with the thematic priorities of the project, including but not limited to:
 - Governance for a Just Transition.
 - Capacity-building programs for businesses and subnational authorities on circular economy approaches, promoting innovation, local value chains, and inclusive employment strategies.
 - Green industrialization, including sector-specific pathways for decarbonizing cement, steel, green hydrogen and rare minerals value chains.
 - Design of retraining and reskilling programs for workers in conventional industrial activities, being specific industries, for instance cement and steel industries, or industrial parks as part of industrial transition strategies.
 - Subnational implementation of Just Transition strategies, including diagnosis and participatory planning.
 - Socioeconomic impact analysis and strategies to ensure labour inclusion, gender equity and territorial equity.
 - Renewable energy deployment with a focus on industrial parks and industrial sector; circular economy.
- All activities shall be developed with a focus on high-quality, technically sound content, presented in an accessible manner. Audience size per session may vary depending on

the topic and format, but efforts should be made to reach a broad and diverse stakeholder base, ensuring regional and gender balance.

- **Spanish will be the primary language of delivery.** If needed, GIZ may support with simultaneous translation for sessions involving international speakers.
- The contractor shall ensure:
 - A comprehensive training plan including a schedule of topics, speakers, and target groups.
 - Preparation of all relevant documentation: speaker guides, moderation scripts, participant guidance materials, technical platforms guidelines.
 - Development of visually attractive outreach materials (e.g. flyers, social media content, save-the-date cards).
 - Technical and logistical coordination for the delivery of sessions, including testing of platforms, briefings for speakers and real-time troubleshooting.
 - Active moderation of sessions, fostering interactive engagement.
 - Delivery of session minutes highlighting key takeaways, questions raised, and responses provided.
 - Compilation and final delivery of training documentation, including speaker presentations, recordings (if applicable), and a structured table of contents for easy archiving.
- All outputs must follow previously agreed visual identity guidelines and formats and should include graphic design support (i.e. Work package 3 provisions).
- The consultant shall remain flexible to adjust the scope, number and format of training sessions based on evolving priorities and coordination with GIZ and key national counterparts.

Milestones for work package 4	Delivery period
Develop a capacitation work plan together with GIZ.	Six weeks after the start of the contract
Development of capacity building formats	During all the contracting period
Capacity building reports	To be presented every six months
Final capacity building report	One month prior to the end of the contracting period

The contractor is responsible for selecting, preparing, training, and managing the short-term and long-term expert staff assigned to perform the advisory tasks. The contractor manages costs and expenses, accounting processes and invoicing in accordance with GIZ requirements.

2.3 Project and knowledge management requirements

Requirements on the assignment of experts:

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

Requirements on expenditure management and cost control:

- The contractor manages costs and expenditures, accounting processes and invoicing in line with GIZ requirements. Cost allocation shall be aligned with the results framework presented in Section 1.1, recognizing that individual activities and deliverables may contribute simultaneously to multiple outputs and indicators. As Work Package 2 provides the primary analytical basis for Outcome Indicator 0.2 and Standard Indicator KT 4.1 through the development of baselines, mitigation assessments, decarbonization pathways, at least 50% of expenditures under WP2 shall be allocated to contributions related to Outcome Indicator 0.2 and KT 4.1, while the remaining share may be apportioned across the outputs and indicators to which the activities demonstrably contribute. Expenditures under Work Packages 1, 3 and 4 shall be apportioned proportionally across the relevant outputs and indicators, reflecting their contribution to the specific outputs. The contractor shall maintain transparent documentation supporting the rationale for all cost allocations.

Monitoring and reporting requirements:

- The contractor plays an active role in the results-based monitoring of the project. Regular monitoring activities must cover at least the following areas:
 - Degree to which activities are implemented
 - Degree to which the objectives, indicators and milestones listed in section 1.1 of these ToRs have been achieved
 - Results (e.g. products, training formats, expert exchanges, communication materials, and other relevant milestones) that fall within the contractor's sphere of responsibility must be reported.
 - Relevant aspects concerning the expert team and its status. In the event of risks related to team composition, the consultant shall notify GIZ at least one month in advance and provide a corresponding backstopping strategy. Any changes to the composition of the expert team must be agreed upon with GIZ prior to implementation and following the GIZ rules and contractual procedures. Potential risks related to delays in deliverables or changes in team structure must be communicated in a timely manner to avoid compromising the quality of outputs.

The contractor reports to GIZ as follows:

- **Inception report.** This report shall be submitted **four weeks** after the contract start date, as specified in the contractual documentation. It must be delivered as a Microsoft Word document and should not exceed 30 pages in length. The inception report shall document all preparatory meetings held with GIZ during the initial phase of the contract, as well as all operational formats developed. It should also include relevant deliberations and planning related to all four work packages, with clearly identifiable chapters for each, where applicable.
- **Interim report(s) on all work packages.** The contractor shall submit concise, executive-level progress reports every six months, covering the implementation status of all work packages (5 to 10 pages plus annexes). A reporting format, using Microsoft Word, will be agreed upon with GIZ during the initial phase of the contract implementation. The first interim report is due in April 2027, followed by subsequent reports every six months, excluding the final reporting period.
- **Final report on all work packages.** To be delivered **one month** before the closing date for the contract as stated in the contract documentation. It must be delivered as a Microsoft Word document and should not exceed 50 pages in length plus annexes.

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 or Spanish, according to previous agreement with GIZ.**

Backstopping requirements:

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

- The contractor's responsibility for its own staff;
- Ensuring the flow of information between GIZ and the contractor's field staff;
- Process-oriented technical and conceptual steering of the consulting services;
- Steering adaptations to changing framework conditions;
- Performance monitoring;
- Ensuring the administrative management of the project;
- Ensuring compliance with reporting requirements;
- Technical support by the contractor's staff for its personnel on the ground;
- Making local use of and sharing the lessons learned by the contractor with the GIZ team.

2.4 Data protection and information security

The provisions on data protection and information security of the current version of GIZ's General Terms and Conditions of Contract (section 1.11 Data protection) apply.

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

2.5 Other requirements

Safeguards and gender measures with specific reference to services:

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

- Gender equality:
 - Planned activities should not be reduced to mere representation of women and youth, and the counting of numbers of how many women attended a meeting, workshop etc. The focus should be on behavioural change, education, active participation in planning and decision-making processes that promote gender equality.

- Promotion of women's participation in capacity building opportunities, and identification of women's needs in men dominated professions (e.g. local supply chains, competences analysis, industrial development).
- Use of inclusive language in documents and events, incl. communication materials.

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 sections 1 and 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.

- Section 1.1.2 of the assessment grid is not applicable –

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 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 must present a strategy for engaging and cooperating with the relevant actors in the partner system who are essential for the implementation of the services.

- Sections 1.2.2 and 1.2.3 of the assessment grid are not applicable –

3.3 Strategy (section 1.3 of the assessment grid)

3.3.1 Strategic approach to achieving the objectives mentioned in the ToRs (section 1.3.1 of the assessment grid)

The tenderer is required to describe and justify the approach it plans to adopt in order to achieve the milestones, objectives and results (see section 2) for which it is responsible. The tenderer is expected to describe the strategic approach to the tasks formulated in section 2 (i.e. not a description of activities) and describe wherever applicable the implementation of the tasks prescribed in the ToRs (implementation strategy with a description of important activities or lines of action).

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.

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).

3.4 Project management (section 1.4 of the assessment grid)

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

3.4.1 Operational plan (section 1.4.1 of the assessment grid)

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

days) and assignment locations of the individual experts, the milestones as presented in section 2 and, in particular, describe all the necessary work stages in detail and in chronological order. The tenderer can define further milestones beyond those prescribed in section 2 and map them out in the plan of operations.

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

In the tender, the tenderer is required to describe the procedure for coordinating with GIZ or with the commissioning project, as well as how it will regularly capture and document the status of task completion, achievement of objectives, results achieved, and risks in the area for which it is responsible, in accordance with the specifications set out in section 2.

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

– Not applicable –

3.4.4 Monitoring (section 1.4.4 of the assessment grid)

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

3.5 Further requirements (section 1.5 of the assessment grid)

The tenderer is required to describe its backstopping strategy (10 points). A CV must be provided for the position for technical backstopping.

4. Personnel

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

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

‘One year of professional experience’ is therefore defined as a cumulative 12 expert months with at least 18 expert days per month, provided no diverging definition is specified for individual qualifications.

Expert 1: Team leader

(section 2.1 of the assessment grid)

This position is a **key expert**. No replacement will be acceptable without any valid grounds (health condition, prevailing country situation, etc.)

Tasks of expert 1: Team Leader

- Overall responsibility for the advisory packages of the contractor.
- Ensuring the coherence and complementarity of the services of the contractor with other services delivered by the Project at different levels (national and sub-national).
- Provide strategic advice to advance towards a just transition for the decarbonization of the industrial sector in the country.
- Design, implementation, monitoring and evaluation of capacity development measures for local partners in the following areas: just transition, industrial sustainable policy and development, industrial parks, energy just transition, sustainability value chains, and other similar agendas related to industrial development, decarbonization and energy transition.
- Participatory development and implementation of advisory services, coordination with key stakeholders (in coordination with GIZ), and ensuring effective information flow.
- Ensure mechanisms for the experts to transfer knowledge among them.
- Responsible for the consideration of cross-cutting themes (e.g. gender equality) within GIZ standards.
- Staff management, identifying the need for short-term assignments within the available budget, planning and steering the assignments, supporting experts, and establishing protocols for how work is assigned to short- and long-term experts, how they report their findings, and how their contributions integrate into project deliverables.
- Ensuring results and financial monitoring are in line with GIZ requirements.
- Regular reporting in accordance with deadlines; review and integrate technical contributions from team members into technical reports.
- Responsibility for checking the use of funds and financial planning in consultation with the commission manager at GIZ.
- Support the GIZ officer responsible for the commission in updating/adapting the project strategy, in evaluations and in preparing a follow-on phase (if applicable).

Qualifications of expert 1: Team leader with national experience

Education/training (section 2.1.1 of the assessment grid):	Master's degree in Economy, Environmental Economics, Industrial, Mechanical or Civil Engineering, Public Policy, Climate Change, Energy Systems, Environmental Science, Climate Change or a closely related field
Language (section 2.1.2 of the assessment grid):	Knowledge of • English B1 level in the Common European Framework of Reference for Languages (4 out of a possible 10 points) and • Spanish C2 in the Common European Framework of Reference for Languages (6 out of a possible 10 points) Knowledge below the indicated level will be evaluated with 0 points.

General professional experience (section 2.1.3 of the assessment grid):	9 years of professional experience in the fields of climate change mitigation, environmental and climate policy, energy transition, and/or sustainable finance (4/10). Experience leading or advising multi-stakeholder projects involving both government institutions and private-sector actors (3/10), Experience in at least one assignment at the national level or subnational level (3/10).
Specific professional experience (section 2.1.4 of the assessment grid):	5 years of professional experience in the design and implementation of low-carbon industrial transformation and energy transition programmes or projects. (10/10).
Leadership/management experience (section 2.1.5 of the assessment grid):	6 years of management experience as project team leader or manager in a company or organization, with proven responsibility for supervising a team of at least 4 experts (6/10) Managing at least 2 project budget above EUR 1 Mio within the last 8 years (4/10).
International professional experience outside the country/region of assignment:	– Not applicable –
Professional experience in the country/ region of assignment (2.1.7 of the assessment grid):	9 years of professional experience in Latin America and the Caribbean, Southern America and/or Central America without Mexico (5/10), 4 years in Mexico (5/10).
Experience in the field of development cooperation (section 2.1.8 of the assessment grid):	8 years of experience in development cooperation projects
Other:	- Not applicable -

Expert 2: Financing Expert with international experience

(section 2.2 of the assessment grid)

This position is a **key expert** with international experience. No replacement will be acceptable without any valid grounds (health condition, prevailing country situation, etc.)

Tasks of expert 2

- Lead all finance-related work packages activities, in close coordination with the Team Leader and the assigned experts
- Identify and analyse existing financing instruments that can support just transition goals in the industrial sector.
- Provide cost estimations for selected green technologies and mitigation options across industrial parks and subsectors.
- Develop and advise industrial actors (companies, park operators, chambers) on the preparation of decarbonization-related investment plans, including CAPEX/OPEX estimates, technology selection, financial structuring, and risk assessment.
- Support the identification and prioritization of bankable projects within industrial parks and across hard-to-abate sectors (cement, steel, hydrogen, among others).

- Design and assess investment frameworks and business cases for decarbonization measures in collaboration with technical experts and sector stakeholders.
- Advise government and private sector actors on the design and application of funding mechanisms, including public incentives, blended finance models and/or green bonds or sustainable investment facilities
- Draft tailored financial guidance for industry actors, financial institutions, and subnational authorities (guides, factsheets, training modules).
- Support dialogue with financial institutions, development banks, and private investors to promote scalable financial solutions for a just transition.
- Contribute to the assessment of financial feasibility in scenario modelling and policy mix evaluations in Work Package 2.
- Review and validate financial assumptions for mitigation scenarios (e.g. technology costs, financing terms, discount rates).
- Participate in capacity-building formats and peer-to-peer exchanges with public and private actors on climate and green finance instruments aligned to industrial decarbonization.
- Continuous review of strategies and activities based on monitoring results and feedback received, and making necessary adjustments to improve the effectiveness and impact of activities.

Qualifications of expert 2.

Education/training (section 2.2.1 of the assessment grid):	Master's degree in Finance, Economics, Public Finance, Sustainable Development, Climate Finance, Business Administration
Language (section 2.2.2 of the assessment grid):	Knowledge of • English C1 level in the Common European Framework of Reference for Languages (5 out of a possible 10 points) and • Spanish B2 level in the Common European Framework of Reference for Languages (3 out of a possible 10 points) • German B2 level in the Common European Framework of Reference for Languages (2 out of a possible 10 points) Knowledge below the indicated level will be evaluated with 0 points.
General professional experience (section 2.2.3 of the assessment grid):	7 years of professional experience in the finance sector, with a proven track record in advising public and/or private institutions on financial instruments and investment strategies (10/10).
Specific professional experience (section 2.2.4 of the assessment grid):	3 years of professional experience during the last 4 years in the design or advisory of sustainable finance mechanisms for low-carbon or Just Transition initiatives, including public and/or private financing approaches. (10/10).
Leadership/management experience:	– Not applicable –
International professional experience outside the country/region of assignment	3 years of professional experience in an EU/OECD country.

(section 2.2.6 of the assessment grid):	
Professional experience in the country/ region of assignment (2.2.7 of the assessment grid):	3 years of professional experience in Latin America and the Caribbean, Southern America or Central America without Mexico (7/10 points), 1 year in Mexico (3/10 points)
Experience in the field of development cooperation (2.2.8 of the assessment grid):	– Not applicable –
Other (2.2.9 of the assessment grid):	– Not applicable –

Expert 3: Energy Expert with international experience

(section 2.3 of the assessment grid)

Tasks of expert 3

- Lead all energy related analysis concerning the several activities under the work packages, incl. coordination with different experts as per assigned. This may always include the mobilisation of relevant international or regional experience in the field of analysis.
- Conduct technical assessments on the potential for renewable energy deployment (for instance, solar, wind, geothermal, biomass) and energy efficiency measures in industrial parks and industry key sectors (including cost-benefit analyses, potential impacts, and examples of best practices).
- Identify opportunities for shared infrastructure models (centralized generation, microgrids, PV Solar deployment, clean hydrogen, among others).
- Support the integration of clean energy solutions into scenario modelling and baseline development (Work Package 2).
- Provide strategic and technical advice to national and subnational authorities (e.g., SENER, state governments) and public enterprises (for instance CFE, LitoMx) on decarbonization roadmaps for the industrial sector and assist in the evaluation and decision-making process regarding their implementation.
- Examine and analyse the currently available financing options at the national level, as well as the support mechanisms for energy efficiency and clean energy measures.
- Assess the financial requirements and obstacles that public sector and productive sector stakeholders need to consider when implementing energy efficiency and clean energy measures.
- Liaise with various institutions, including government agencies, financial institutions, project developers, and the private sector, under the approval and coordination of GIZ, to ensure the support and feasibility of financing proposals for clean energy deployment.
- Participate in the design and review of investment plans involving energy technologies (in coordination with the Financial and Industrial experts).
- Contribute to the development of capacity-building materials and training programs related to energy transition for the industrial sector.
- Assist in identifying energy-related co-benefits, such as cost savings, air quality improvements, gender gaps closing and local employment.

- Continuous review of strategies and activities based on monitoring results and feedback received, and making necessary adjustments to improve the effectiveness and impact of activities.

Qualifications of expert 3.

Education/training (section 2.3.1 of the assessment grid):	Master's degree in Energy Systems Engineering, Renewable Energy, Electrical, Environmental, Industrial, Chemical or Mechanical Engineering, Environmental Technology, or a closely related field.
Language (section 2.3.2 of the assessment grid):	Knowledge of • English C1 level in the Common European Framework of Reference for Languages (5 out of a possible 10 points) and • Spanish C1 in the Common European Framework of Reference for Languages (3 out of a possible 10 points) • German B2 level in the Common European Framework of Reference for Languages (2 out of a possible 10 points) Knowledge below the indicated level will be evaluated with 0 points.
General professional experience (section 2.3.3 of the assessment grid):	7 years of professional experience in the energy sector (renewable energy and energy efficiency) (10/10).
Specific professional experience (section 2.3.4 of the assessment grid):	2 years of professional experience in industrial energy efficiency (5/10) 3 years of professional experience in energy transition or clean energy technology deployment (5/10).
Leadership/management experience:	– Not applicable –
International professional experience outside the country/region of assignment (section 2.3.6 of the assessment grid):	3 years of professional experience in an EU/OECD country
Professional experience in the country/ region of assignment (2.3.7 of the assessment grid):	3 years of professional experience in Latin America and the Caribbean, South America or Central America (in accordance with UN DESA Statistics Division) (7/10 points), of which 1 year in Mexico (3/10 points)
Experience in the field of development cooperation:	– Not applicable –
Other:	– Not applicable –

Expert 4: Technology and Industry expert with international experience

(section 2.4 of the assessment grid)

This position is a **key expert** with international experience. No replacement will be acceptable without any valid grounds (health condition, prevailing country situation, etc.)

Tasks of expert 4

- Analyse current technological configurations and material flow in selected industrial subsectors and industrial parks.
- Identify and assess energy related green technologies applicable to each subsector (e.g., electric decarbonization solutions, energy efficient motors, alternative fuels, CO₂ capture, climate-friendly thermal management, avoidance of non-CO₂ emissions, etc.).
- Provide input into the marginal abatement cost curve (MACC) by quantifying technology potential, costs, and applicability across regions and firms (Work package 2).
- Develop technical feasibility assessments and advise on decarbonization roadmaps for industrial parks and industrial subsectors.
- Support the design of investment plans and technology deployment strategies alongside financing and energy experts.
- Provide sectoral expertise to identify hard-to-abate sectors and priority actions for technological upgrading.
- Advise on technical requirements for infrastructure adaptation, industrial symbiosis (materials and energy flows), or shared service models (for instance shared utilities, circular economy, energy systems).
- Advise on cooperative models for eco-industrial parks with focus on park management units (based on
- Participate in capacity building sessions and prepare technical training content on clean production and technology innovation.
- Contribute to technical reports, policy briefs, and factsheets with evidence-based recommendations on technology options aligned with a just transition.
- Work closely with modelling experts to define technology adoption scenarios and validate assumptions in work package 2.
- Continuous review of strategies and activities based on monitoring results and feedback received, and making necessary adjustments to improve the effectiveness and impact of activities.

Qualifications of expert 4.

Education/training (section 2.4.1 of the assessment grid):	Master's degree in Industrial Engineering, Mechanical Engineering, Process Engineering, Materials Science, Production Systems, or related applied technological fields.
Language (section 2.4.2 of the assessment grid):	Knowledge of • English C1 level in the Common European Framework of Reference for Languages (5 out of a possible 10 points) and • Spanish B2 level in the Common European Framework of Reference for Languages (5 out of a possible 10 points)

	Knowledge below the indicated level will be evaluated with 0 points.
General professional experience (section 2.4.3 of the assessment grid):	7 years of professional experience in the industry and technology sector (4/10), with a focus on industrial decarbonisation activities in emissions-intensive industries. (6/10)
Specific professional experience (section 2.4.4 of the assessment grid):	4 years of professional experience advising on industrial decarbonisation pathways (10/10)
Leadership/management experience:	– Not applicable –
International professional experience outside the country/region of assignment (section 2.4.6 of the assessment grid):	3 years of professional experience in an EU/OECD country
Professional experience in the country/ region of assignment (2.4.7 of the assessment grid):	3 years of professional experience in Latin America and the Caribbean, Southern America or Central America (without Mexico) (5/10 points), 1 year in Mexico (5/10 points)
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):	3 years of experience working with industrial park management units (administrators, operators, or associations), on decarbonisation and sustainability strategies.

Expert 5: Communication expert with national experience

(section 2.5 of the assessment grid)

Tasks of expert 5

- Lead the design and implementation of the communication work package (3), ensuring all outputs align with GIZ's strategy and branding guidelines.
- Develop and implement a Knowledge Management system that integrates the various high-level activities and materials used to implement a just transition in the industrial sector.
- Develop clear, engaging, and inclusive narratives on the just transition in Mexico, tested through audience-centered methods.
- Coordinate the creation of multimedia materials (audio, short videos, animated reels, infographics, event coverage), ensuring quality control and consistency.
- Draft and edit editorial content for publications, factsheets, brochures, and policy outreach products in Spanish and English.
- Manage the production and delivery of visually engaging materials across multiple platforms, including social media and institutional websites.
- Design and oversee the content dissemination strategy to reach key audiences, including planning communication outputs around major project events and milestones

(workshops, report launches, or public dialogues) to maximize visibility and engagement, considering the support of key stakeholders and partner platform.

- Coordinate with GIZ, technical experts, and external creatives to ensure content is accurate, accessible, and strategically aligned.
- Provide strategic communication advice to GIZ and counterparts, including facilitating up to 10 advisory sessions during the contract.
- Lead the documentation and visibility of project milestones in close coordination with the team leader and experts from other work packages.
- In coordination with GIZ, develop a map of key actors to be included in the Knowledge Management (KM) system, enabling their support and participation in the dissemination of materials and events.
- Continuous review of strategies and activities based on monitoring results and feedback received, and making necessary adjustments to improve the effectiveness and impact of activities.

Qualifications of expert 5.

Education/training (section 2.5.1 of the assessment grid):	Master's degree in Communications, Journalism, Political Science, Public Affairs, Marketing, or a closely related field.
Language (section 2.5.2 of the assessment grid):	Knowledge of • English B1 level in the Common European Framework of Reference for Languages (2 out of a possible 10 points) and • Spanish C2 level in the Common European Framework of Reference for Languages (8 out of a possible 10 points) Knowledge below the indicated level will be evaluated with 0 points.
General professional experience (section 2.5.3 of the assessment grid):	7 years of professional experience in the field of communication strategies for development or climate projects (10/10).
Specific professional experience (section 2.5.4 of the assessment grid):	2 years of professional experience in communication projects implemented in Mexico, including the development of communication materials and outreach products. (10/10).
Leadership/management experience:	– Not applicable –
International professional experience outside the country/region of assignment:	– Not applicable –
Professional experience in the country/ region of assignment (2.5.7 of the assessment grid):	3 years of professional experience in Latin America and the Caribbean, Southern America or Central America (without Mexico) (5/10 points), 1 year in Mexico) (5/10 points)
Experience in the field of development cooperation (2.5.8 of the assessment grid):	– Not applicable –
Other (2.5.9 of the assessment grid):	– Not applicable –

Expert 6: Project Coordination Junior Expert with national experience

(section 2.6 of the assessment grid)

Tasks of expert 6:

- Support the Team Leader in the day-to-day coordination and implementation of project activities across all work packages.
- Coordinate communication and follow-up among GIZ, project experts, counterparts and other relevant stakeholders.
- Support the planning, organisation and follow-up of workshops, consultations, technical meetings, missions and other project events.
- Monitor project implementation and support the tracking of deliverables, timelines and contractual obligations.
- Support the preparation, consolidation and quality review of project outputs, including reports, presentations and technical materials.
- Support knowledge management, stakeholder engagement and reporting activities required under the contract.

Qualifications of expert 6.

Education/training (section 2.6.1 of the assessment grid):	Bachelor's degree in in Public Administration, Political Science, International Relations, Economics, Engineering, Environmental Sciences, Energy Studies, Sustainable Development, or a related field.
Language (section 2.6.2 of the assessment grid):	Knowledge of • English B1 level in the Common European Framework of Reference for Languages (5 out of a possible 10 points), and • Spanish C2 level in the Common European Framework of Reference for Languages (5 out of a possible 10 points). Knowledge below the indicated level will be evaluated with 0 points.
General professional experience (section 2.6.3 of the assessment grid):	3 years of experience in project management, project coordination, technical assistance, public policy, sustainable development, climate change, energy, industrial development, or related fields (10/10)
Specific professional experience (section 2.6.4 of the assessment grid):	3 years of experience supporting the implementation of projects involving multiple stakeholders, including organisation of workshops, consultations, or technical events (10/10).
Leadership/management experience:	– Not applicable –
International professional experience outside the country/region of assignment:	– Not applicable –
Professional experience in the country/ region of assignment (2.6.7 of the assessment grid):	At least 2 years of professional experience in Mexico supporting projects involving public institutions, private sector actors, academia, or international cooperation organisations

Experience in the field of development cooperation (2.6.8 of the assessment grid)::	– Not applicable –
Other (2.6.9 of the assessment grid)::	– Not applicable –

Expert 7: Pool 1 ‘Short term expert pool for just transition expertise’ with up to 10 experts 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 pool 1 constitute minimum requirements, the fulfilment of which must be confirmed by GIZ before the experts are assigned.

For experts not named in the tender, GIZ must confirm before the assignment that the proposed expert’s qualifications comply are equivalent to the qualification requirements defined for the respective expert category in these Terms of Reference.

The qualifications specified for the pool constitute minimum requirements, and GIZ reserves the right to verify compliance with these requirements before any expert is 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.

Tasks of the expert pool 1

- Engage on specific service requests from GIZ, with clearly defined deliverables and timelines.
- Provide specialized, short-term support across the project’s four work packages.
- Advise on policy, legal, or regulatory frameworks related to just transition in industry and energy sectors.
- Support sector-specific decarbonization strategies, technology assessments, and scenario modelling inputs (e.g., MACCs, investment plans, among other topics as described).
- Contribute to financing strategies, cost-benefit analyses, and the design of funding mechanisms aligned with just transition approaches.
- Provide expertise on labour market transitions, social protection, gender equality, and territorial inclusion.
- Participate in dialogues, workshops, and training activities, offering international insights and peer learning.
- Review technical products and ensuring integration of international best practices and co-benefits (environmental, social, economic).

Qualifications of the expert pool 1

Education/training:	All experts with a Master’s degree in the respective fields of expertise such as Law, Economics, Engineering, Political Science, Public Policy, Environmental Sciences, or Social Sciences.
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Language:	All experts in the pool each with knowledge of: • English C1 level in the Common European Framework of Reference for Languages • Spanish B2 level in the Common European Framework of Reference for Languages •
General professional experience:	All experts each with 9 years of professional experience in the directly related relevant sector for the respective experts
Specific professional experience:	– Not applicable –
Leadership/management experience:	– Not applicable –
International professional experience outside the country/region of assignment:	8 experts, each with 3 years of professional experience in in an EU/OECD country
Professional experience in the country/ region of assignment:	6 experts, each with 2 years of professional experience in Latin America and the Caribbean, Southern America or Central America, 1 year in Mexico.
Experience in the field of development cooperation:	5 experts, each with 2 years of experience in development cooperation projects
Other:	2 experts with documented experience in scenario modelling platforms (for instance LEAP, TIMES, among others) applied to climate analysis.

Expert 8: Pool 2 ‘Short term expert pool for just transition expertise’ with 10 experts with national 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 pool 1 constitute minimum requirements, the fulfilment of which must be confirmed by GIZ before the experts are assigned.

For experts not named in the tender, GIZ must confirm before the assignment that the proposed expert’s qualifications comply are equivalent to the qualification requirements defined for the respective expert category in these Terms of Reference.

The qualifications specified for the pool constitute minimum requirements, and GIZ reserves the right to verify compliance with these requirements before any expert is 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.

Tasks of the expert pool 2

- Collaborating with the Team Leader and other experts, ensuring consistency and complementarity across tasks, deliverables and milestones.

- Provide context-specific technical inputs to studies, policy briefs, baseline assessments, and regulatory analysis related to just transition in industry parks, industrial subsectors and energy sectors in alignment with the project's training strategy.
- Support the design and delivery of capacity-building formats, including trainings, workshops, and webinars tailored to public institutions, industrial actors, and civil society stakeholders.
- Participate in the preparation or facilitation of multi-stakeholder dialogues and roundtables at the subnational level.
- Contribute to the adaptation of international recommendations to Mexico's institutional, social, and economic context.
- Support the identification of social, gender, and labour considerations in subnational just transition planning.
- Assisting in the collection of local data, stakeholder mapping, or validation of assumptions for scenario modelling or investment planning.
- Collaborating with communication and knowledge management activities, including preparation of case studies, technical summaries, events preparation, development and documentation, facilitation materials and all those related.
- Participating in the review of technical products to ensure consistency with national priorities, regulations, and stakeholder perspectives.
- Working in close coordination with GIZ to ensure that technical inputs and activities are aligned with project objectives and expectations.

Qualifications of the expert pool 2

Education/training:	All experts with a Master's degree in fields relevant to the tasks of this pool, such as Political Science, Law, Economics, Engineering, Environmental Studies, Public Administration, or Social Sciences.
Language:	10 experts each with knowledge of • Spanish C1 level in the Common European Framework of Reference for Languages and • English B1 level in the Common European Framework of Reference for Languages
General professional experience:	10 experts each with 3 years of professional experience in the directly related relevant sector for the respective experts.
Specific professional experience:	6 experts, each with 2 years of professional experience in federal and subnational planning and governance processes in Mexico
Leadership/management experience:	3 experts, each with 2 years of management experience in projects, companies or other organisations with disciplinary leadership of at least 2 people
International professional experience outside the country/region of assignment:	3 experts, each with 1 year of professional experience in in an EU/OECD country
Professional experience in the country/ region of assignment:	7 experts, each with 3 years of professional experience in Latin America and the Caribbean, Southern America or Central America.
Experience in the field of development cooperation:	3 experts ,each with 1 year of experience in development cooperation projects

Other:	Not applicable -
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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

5.1 Assignment of experts

In your tender, please do not deviate from the specification of quantities 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.

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 3.3.2)	Number of international flights	Number of national flights
Expert 1 Team Leader	32	28	70	No	4	2
Expert 2 Finance Expert with International Experience	49	21	70	No	3	2

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 3.3.2)	Number of international flights	Number of national flights
Expert 3 Energy Expert with International experience	62	28	90	No	4	3
Expert 4 Technology and Industry Expert with International Experience	62	28	90	No	4	3
Expert 5 Communication Expert with National Experience	0	105	105	No	0	5
Expert 6: Project Coordination Junior Expert with National Experience	0	150	150	No	0	5
Expert 7: Short-term Expert Pool with International Experience	236	84	320	No	12	10
Expert 8: Short-term Expert Pool with National Experience	0	285	285	No	0	10
Total					27	40

5.2 National administrative staff

– Not applicable –

5.3 Travel expenses

5.3.1 Travel – sustainability considerations

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

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

There are many different providers in the market for emissions certificates, and they have different climate impact ambitions. The [Development and Climate Alliance](#) has published a [list of standards](#) (available only in German). 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	27 / up to 1,700 EUR round travel to Mexico against evidence Only travel to Mexico with prior GIZ approval will be reimbursed. The international air budget does not include additional travel costs such as visas, ground transportation, etc
Total number of national flights	40 / up to 500 EUR round travel within Mexico against evidence
CO ₂ offsets for flights	1 / 1,890 EUR An unalterable budget for CO ₂ offsets for settlement against evidence is specified.
Transport costs to / from airport	1 / 3,350 EUR
Per-diem allowances	349 / up to 36.00 EUR
Accommodation allowances	309 nights / up to 200.00 EUR
Other travel expenses (visa, project-related travel expenses outside the place of business etc.)	N.A.

Per-diem allowances are reimbursed as a lump sum in the contractually agreed amount..

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

For the country Mexico, tenderers may offer accommodation allowances up to EUR 200,00 per night. This is less than 75% of the maximum amount 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.

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

5.4 Materials and equipment

The contractor will be responsible for its own materials and equipment.

5.5 Operating costs in the country of assignment

– Not applicable –

The contractor will be responsible for assuring all operating costs for the experts are arranged. No additional costs of any kind for operation (for instance, equipment, materials, office, etc) will be covered by GIZ or any partner. In some cases, during travel to Mexico, the contractor experts will be able to use GIZ facilities, if available, for short periods of time per day. All experts can work remotely.

5.6 Workshops, education and training

Workshop budget: EUR 6 000.

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

- Provision of electronic platforms
- Technical systems
- Moderation services
- Translation/interpreting services

The budget includes costs associated with hosting 30 meetings/workshops with translation channels. This covers additional costs to the consultant associated with the provision of virtual platforms, registration, rehearsals (including for translators) and for a facilitator to be present for the connection period at the start of each event

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. These are covered by the corresponding number of expert days and travel expenses (see sections 5.1 and 5.3 above).

The contractor is not responsible for the logistical organisation of the workshops and therefore the costs do not need to be specified. Wherever applicable, GIZ will cover logistical costs for in-person workshops.

5.7 Local contributions

– Not applicable –

5.8 Other costs

Subcontracts for audiovisual, graphic and editorial production

A fixed budget of EUR 145,000 is considered for subcontracting the audiovisual, graphic and editorial production services described in sections 2.2.3 and 2.2.3A to one or more subcontractors of the Contractor.

Use of the budget and the corresponding subcontracting arrangements require prior approval by GIZ. Costs shall be settled against evidence up to the maximum budget indicated above. The Contractor shall have no entitlement to use the budget in full.

The budget does not cover the Contractor's expert fees for strategic communication advice, content planning, preparation of production briefs, coordination, supervision or quality assurance. These services are covered by the corresponding expert days specified in section 5.1.

5.9 Flexible remuneration item

Budget for flexible remuneration: EUR 125,000

The fixed, unalterable budget above is earmarked in the price schedule for flexible remuneration. Flexible remuneration is intended to facilitate the flexible management of the contract by the commission manager at GIZ. The contractor can make use of the funds in accordance with section 3.3.5.7 of the General Terms and Conditions.

6. Requirements on the format of the tender

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

The technical-methodological concept of the tender (section 3 of the ToRs) must not exceed 30 pages (not including the cover page, list of abbreviations, table of contents, brief introduction and CV for the backstopper). Please submit references as external content (links) wherever necessary, not excessively. Please identify the external content with its date of creation. This date must not be outside the tendering deadline.

The CVs of the staff proposed in accordance with section 4 of the ToRs must be in the EU format and not more than four pages in length. The CVs shall 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) (if relevant)

- International professional experience/professional experience in the country of assignment: clear information on the reference projects or fixed positions in the company/organisation in which the requirements specified in section 4 were fulfilled (for example, actual duration of assignment on the ground in full-time expert days, weeks or months) (if relevant)

In order to facilitate the assessment, we request that you number the references sequentially and provide only references that are clearly related to the object of this tender.

7. Options or follow-on contract

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

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

Nature and scope:

While retaining the overall character of the contract, there is a possibility of GIZ continuing to obtain the services specified in section 2 of these Terms of Reference and/or of expanding the contract to include further services of the same kind. The items shown in section 5 (Costing requirements) of these Terms of Reference can be increased by up to EUR 2.0 Mio and extended by up to 24 months. Within this framework, the options can be exercised in up to two parts.

Precondition:

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

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

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

Scope of possible services:

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

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

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

8. Annexes

- A - Project factsheet
- B - Declaration of consent to the use of photos/videos (EN / ES)
- C – Audio/ Video production