

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

CONFIDENTIAL

Analysis of Critical Raw Material Value Chains in Morocco in the Context of the Energy Transition	Project number/ cost centre: G-012485-010
	Tender number 10027620

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1. Context

The global transition towards renewable energy systems, electric mobility and clean technologies is leading to a significant increase in demand for critical raw materials (CRMs) and related intermediate products and industrial processing capacities. Against this backdrop, resilient and diversified supply chains, secure access to strategic raw materials and increased local value creation are gaining growing importance at international level. At the same time, European and international and industrial strategies increasingly seek to combine supply security with green industrial development, downstream integration, resilient nearshoring arrangements, further increasing demand for trusted international industrial cooperation and strategic raw material sourcing.

In this context, Morocco is increasingly positioning itself as a strategic industrial and energy transition partner between Europe and Africa. The country combines significant renewable energy potential, a growing industrial base and strong connectivity to European and international markets with growing ambitions in industrial decarbonisation, electric mobility and green industrial transformation. As Africa's leading automotive manufacturing hub and an emerging platform for renewable energy and export-oriented industries, Morocco offers growing potential for industrial integration along energy transition-related value chains.

The country also possesses several raw materials of strategic relevance for the energy transition, including phosphates, cobalt, manganese and silver. Combined with the country's industrial capabilities particularly in the automotive, chemical and energy sectors, logistics infrastructure and renewable energy ambitions, these resources create emerging opportunities for increased local value creation, industrial processing and downstream integration into international value chains related to battery technologies, electric mobility and renewable energy industries. Recent developments in battery materials, precursor and active cathode materials (pCAM), cell manufacturing and recycling further underline these dynamics.

Against this background, there is a need for a structured and concise analysis of Morocco's position within selected raw material value chains and the identification of realistic development opportunities along these chains. Particular attention shall be given to opportunities for increased local value creation, industrial processing, downstream integration and the production of intermediate and higher-value-added products linked to energy and automotive transition-related industries.

The study shall apply a value chain approach covering upstream, midstream and selected downstream segments. It shall assess Morocco's current positioning across different stages of selected value chains, identify development potentials and analyse opportunities for integration into international industrial value chains linked to the energy and automotive transition and resilient supply chains, in particular with regard to sectors such as battery materials and cell manufacturing, electric mobility and renewable energy technologies.

The study is intended as a first analytical and strategic assessment to identify relevant development opportunities, industrial linkages and potential areas for further analysis or engagement.

The objective of the services to be tendered is therefore to analyse selected critical raw material value chains in Morocco, identify opportunities for increased local value creation and industrial development, and assess Morocco's potential positioning within international value chains linked to the energy transition.

The study is being carried out as part of the German-Moroccan Energy Partnership project (PAREMA) and complements recent analyses on the complementarities of German-Moroccan industrial value chains conducted by GIZ and the Moroccan Ministry of Investment, Convergence and Evaluation of Public Policies (MICEPP) in close coordination with key German and Moroccan stakeholders, aimed at identifying opportunities for sustainable industrial transformation, industrial cooperation and increased local value creation in key industrial transformation sectors.

2. Tasks to be performed by the contractor

The contractor is responsible for providing analytical services to assess selected critical raw material value chains in Morocco and to identify development potentials along these chains. The assignment combines desk-based research with targeted stakeholder consultations and results in a concise, policy-oriented study. The study shall apply a value chain approach covering upstream, midstream and selected downstream segments, with particular attention to opportunities for local value creation, industrial integration and relevance for international energy transition-related supply chains.

Task 1: Inception and methodological framework

- Develop and refine the overall methodological and analytical framework for the assignment, including the work process, analytical approach and assessment criteria for development potential, industrial relevance and integration into international value chains
- Develop and apply a methodology for the selection of specific raw materials and respective value chains to be analysed, and confirm the final selection in consultation with the project
- Define the scope and analytical boundaries of the selected value chains, including upstream, midstream and selected downstream segments
- Develop a preliminary structure of the final report
- Submit an inception note outlining methodology, structure and work plan

Deliverable: Inception Note (max. 5 pages), including methodology, analytical framework, confirmed scope, work plan and proposed report structure

Task 2: Desk research and mapping of the current situation

Task 2 shall focus on descriptive baseline mapping and shall not yet include an assessment of development potential or strategic positioning. The tasks specifically includes:

- Review relevant literature, data sources and existing studies on selected critical raw materials and related value chains, industrial development and energy transition-related industries identified under Task 1
- Compile a desk-based baseline on Morocco's existing resource base, industrial activities, processing capacities and downstream linkages relevant to the selected value chains
- Analyse relevant regulatory, industrial and market framework conditions
- Identify and map key actors relevant to the selected value chains
- Identify major market trends and strategic developments relevant to international energy transition-related industries and resilient supply chains

Deliverable: Short analytical input (integrated into the draft report) covering the current situation, key actors, framework conditions and Morocco's baseline positioning within the selected value chains

Task 3: Stakeholder consultations

- Identify and propose a list of relevant stakeholders along the selected value chains, including representatives from industry, public institutions and, where relevant, research organisations
- Develop a short interview guide aligned with the objectives of the study and the value chain analysis framework
- Conduct approximately 5 to 8 semi-structured interviews (remote or in-person, as appropriate), ensuring coverage of different stages of the value chains (e.g. extraction, processing, industrial application); The list of stakeholders shall be validated by the commissioning entity prior to conducting the interviews
- Use stakeholder consultations to validate preliminary findings, identify practical constraints and assess industrial relevance across selected value chain segments;
- Integrate stakeholder inputs into the overall analysis in a structured and traceable manner

Deliverable: Summary of stakeholder consultations (integrated into the draft report), including key insights by value chain segment and cross-cutting findings relevant for the overall analysis

Task 4: Value chain analysis

For each selected raw material, analyse the value chain along the following stages: extraction, processing, assembly and/or production of intermediate products, end-use applications and recycling.

Building on the baseline established under Task 2 and the stakeholder consultations conducted under Task 3, the analysis shall assess opportunities for increased local value creation, industrial upgrading and integration into international energy transition-related supply chains.

For each stage:

- Identify existing and missing value chain segments in Morocco
- Assess opportunities for increased local processing, industrial integration and downstream value creation
- Identify relevant intermediate products and downstream applications linked to the selected raw materials
- Identify key bottlenecks and constraints affecting further industrial development
- Assess the relevance of selected value chain segments for international demand related to the energy transition, in particular with regard to potential linkages with European and especially German industries
- Assess realistic opportunities for Morocco to strengthen its strategic positioning within international energy transition-related supply chains

The analysis shall include visual value chain mapping illustrating the different stages of the value chains, Morocco's current positioning and identified development opportunities.

Deliverable: Structured written value chain analysis (integrated into the draft report), including assessment of Morocco's current positioning, key constraints, industrial development potential and opportunities for increased local value creation and integration into international energy transition-related supply chains.

The analysis shall include:

- one detailed visual value chain mapping per selected raw material, illustrating key stages, existing activities in Morocco, industrial linkages, identified gaps and development opportunities
- one consolidated overview graphic summarising Morocco's positioning and potential opportunities across the selected raw material value chains.

Task 5: Synthesis and reporting

- Consolidate findings from the value chain analysis and stakeholder consultations
- Identify and prioritise a limited number of value chain segments with high potential for local value creation and industrial development in Morocco and strong relevance for international demand for energy transition-related industries, in particular in key markets such as Europe (especially Germany), based on clear qualitative criteria
- Derive strategic conclusions regarding Morocco's potential positioning within selected value chains (e.g. raw material supplier, processing location, industrial hub)
- Prioritise selected value chain segments with regard to their strategic relevance for integration into international energy transition-related supply chains
- Identify key enabling factors and remaining constraints affecting further industrial development
- Derive a concise set of evidence-based conclusions on priority areas for further development

Deliverables:

- Draft Report (approx. 25-40 pages)
- Final Report incorporating feedback
- Executive Summary (max. 3 pages)
- PowerPoint presentation (15–20 slides) summarising the key findings and conclusions of the study, suitable for presentation at international conferences and stakeholder events.

Coordination, validation and deliverables

The contractor shall ensure close coordination with the commissioning entity throughout the assignment. This includes:

- regular coordination meetings (at least at inception, mid-term and draft stage)
- validation of the inception note prior to continuation of the analysis
- exchange on preliminary findings during the implementation phase
- presentation and discussion of draft results and conclusions

Meetings will be held remotely unless otherwise agreed.

All deliverables shall be submitted in English. Executive summaries and presentation materials may additionally be requested in French.

Milestones

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

Milestones/process steps/partial services	Deadline/place/person responsible
Submission of inception note	Week 1 / Remote / Contractor
Completion of stakeholder consultations	Week 4 / Remote / Contractor
Submission of draft report	Week 7 / Remote / Contractor
Submission of final report	Week 9 / Remote / Contractor

Period of assignment: from 10.07.2026 until 10.12.2026.

3. Concept

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

Technical-methodological concept

The tenderer is required to present a clear and structured technical-methodological concept demonstrating how the tasks defined in Chapter 2 will be implemented.

The concept shall focus on the analytical approach and the practical implementation of the assignment. In line with the nature of this assignment as a compact analytical study, the criteria Cooperation (1.2), Steering structure (1.3) and Learning and innovation (1.5) are not required.

With regard to the strategy (1.1), the tenderer is required to present and justify a coherent analytical approach for assessing selected critical raw material value chains. The tenderer shall explain how the proposed approach ensures a structured and comparable analysis across value chains and describe how development potentials as well as Morocco's positioning within international value chains related to the energy transition will be assessed. In addition, the tenderer is expected to propose a preliminary structure of the final report.

With regard to the processes (1.4), the tenderer is required to describe the key work steps necessary for the implementation of the assignment and to present a concise work plan or schedule covering the tasks defined in Chapter 2. The tenderer shall further explain the sequence of the main work steps and their alignment with the defined milestones.

With regard to the Project management of the contractor (1.6), the tenderer is required to describe its approach to project management and internal quality assurance and to explain how coordination and communication with the commissioning entity will be ensured throughout the assignment.

4. Personnel concept

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

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

Key expert 1: Team Lead / Value Chain Analysis

Tasks of key expert 1

- Overall responsibility for the implementation of the assignment, including quality and timely delivery of all outputs
- Design and application of the analytical approach and methodology
- Coordination of all tasks defined in Chapter 2
- Lead the value chain analysis across selected raw materials
- Ensure integration of stakeholder inputs into the analysis
- Consolidation and synthesis of findings and preparation of all deliverables
- Main point of contact for the commissioning entity

Qualifications of key expert 1

- Education/training (2.2.1): University degree (Master's level or equivalent) in economics, engineering, energy studies, natural resources, industrial development or a related field
- Language (2.2.2): English C1; French B2
- General professional experience (2.2.3): 8 years of professional experience in relevant sectors such as energy, raw materials, industrial development or related fields
- Specific professional experience (2.2.4): 5 years of experience in value chain analysis, including experience in at least one of the following areas: raw materials or mining; industrial development or supply chains; energy transition-related industries
- Leadership/management experience (2.2.5): Demonstrated experience in coordinating and leading analytical assignments or studies involving multiple stakeholders and responsibility for deliverables
- Regional experience (2.2.6): 3 years of professional experience in North Africa, Africa, the Middle East or comparable emerging markets
- Development Cooperation (DC) experience (2.2.7): Not required
- Other (2.2.8): Demonstrated experience in preparing structured analytical reports or policy-oriented studies

Key expert 2: Moroccan raw materials and industrial market expert

Tasks of key expert 2

- Support the implementation of the assignment with a focus on industrial applications and market perspectives
- Contribute to the analysis of end-use sectors, in particular energy transition-related industries such as battery manufacturing, electric mobility and renewable energy technologies
- Contribute to the assessment of industrial linkages, market dynamics and international demand

- Support the identification and prioritisation of value chain segments
- Contribute to stakeholder engagement and ensure that the analysis reflects the specific characteristics of the Moroccan raw materials and industrial context

Qualifications of key expert 2

- Education/training (2.3.1): University degree (Master's level or equivalent) in engineering, economics, geology, mining, industrial economics, energy systems, business administration or a related field
- Language (2.3.2): French C1; English B2
- General professional experience (2.3.3): 5 years of professional experience in sectors such as raw materials, mining, industry, energy, industrial development or related fields
- Specific professional experience (2.3.4): 3 years of professional experience in the Moroccan raw materials, mining, industrial or energy sector, including experience in at least one of the following areas: industrial value chains; industrial processing; battery or electric mobility value chains; renewable energy-related industries
- Leadership/management experience (2.3.5): Not required
- Regional experience (2.3.6): 3 years of professional experience in Morocco or North Africa, including knowledge of the Moroccan industrial and raw materials landscape
- Development Cooperation (DC) experience (2.3.7): Not required
- Other (2.3.8): Experience in stakeholder engagement and contribution to 2 analytical studies or market assessments or value chain analyses

Soft skills of team members

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

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

5. Costing requirements

Assignment of personnel and travel expenses

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

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

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

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

Sustainability aspects for travel

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

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

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

Specification of inputs

The following basic calculations for the contract for works are a reference value based on the acceptance criteria for each partial work/milestone specified in Chapter 2 (Tasks to be performed by the contractor).

Since the contract to be concluded is a contract for works, we would ask you to offer your services at a lump sum price.

In addition, the assessment of the financial bid is also based on the underlying daily rate. Please also provide the underlying daily rate. A breakdown of days is not required.

Milestones/partial works	Estimated expert days for orientation – Key Expert 1	Estimated expert days for orientation – Key Expert 2	Deadline
Task 1: Inception and methodological framework	3	1	Week 1 / 27.07.2026
Task 2: Desk research and mapping of the current situation	5	3	Week 3 / 10.08.2026
Task 3: Stakeholder consultations	4	3	Week 4 / 17.08.2026
Task 4: Value chain analysis	10	5	Week 7 / 7.09.2026
Task 5: Synthesis and reporting	5	1	Week 9 / 21.09.2026

6. Inputs of GIZ or other actors

GIZ and/or other actors are expected to make the following available:

- Relevant background documents, studies and publicly available information related to the assignment
- Support in facilitating contact with selected stakeholders where appropriate
- Coordination and feedback during the implementation of the assignment

7. Requirements on the format of the tender

The structure of the tender must correspond to the structure of the ToR. In particular, the detailed structure of the concept (Chapter 3) should be organised in accordance with the positively weighted criteria in the assessment grid (not with zero).

The tender must be legible (font size 11 or larger) and clearly formulated. It must be drawn up in English.

The complete tender must not exceed 10 pages (excluding CVs). If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment. External content (e.g. links to websites) will also not be considered.

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

As the contract to be concluded is a contract for works, please offer a fixed lump sum price that covers all relevant costs (fees, travel expenses etc.). The price bid will be evaluated on the basis of the specified lump sum price. In addition, please also provide the underlying daily rate. A breakdown of days is not required.

8. Option

In addition to the services described in Chapter 2, the commissioning entity may request optional dissemination and stakeholder engagement activities related to the findings of the study.

Type and scope

The contractor is responsible for providing the following optional services:

- Prepare presentation materials summarising the key findings and conclusions of the study
- Prepare and facilitate one stakeholder workshop in Rabat, Morocco, with relevant representatives from public institutions, industry and other relevant stakeholders
- Present and discuss the study findings, including identified development potentials, constraints and priority value chain segments
- Document the main discussion points and conclusions of the workshop in a short summary note

Requirements

Exercising the option will depend on the positive assessment of the study results by the commissioning entity and the relevance of organising a stakeholder discussion workshop based on the findings of the study.

The decision on exercising the option is expected to be made within 4 weeks after submission of the final report. If exercised, the optional services shall be implemented within the overall contract period.

The option will be exercised by means of a contract extension on the basis of the individual approaches already offered.

Quantitative requirements for the optional services

	Number of experts	Number of days per expert	Total	Comments
Key Expert 1	1	4	4	Preparation and facilitation of stakeholder workshop; after coordination with commissioning party: play an active role in the workshop
Key Expert 2	1	2	2	Stakeholder coordination, workshop contribution; after coordination with commissioning party: play an active role in the workshop
Transport	Quantity			Comments
Fixed travel budget	1			<p>A budget is earmarked for travel to the following countries: Morocco. Travel is related to the implementation of the workshop.</p> <p>A fixed budget of EUR 5000 is earmarked for settling travel expenses against evidence.</p> <p>You can find further information on the travel expense budget in the 'Price schedule' document. Please use the 'Explanations' column in the price schedule to break down the individual items. Settlement is possible only until the budget is depleted.</p>

Requirements on the format of the tender for the option

Please complete both spreadsheets in the price schedule, i.e. one for the main service and one for the optional service.

9. Outsourced processing of personal data

The contractor is not expected to process personal data beyond standard business contact information required for the implementation of stakeholder consultations and coordination activities.

The data protection and information security provisions set out in the currently applicable version of the AVB apply.