

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

CONFIDENTIAL

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Management and Protection of Protected Areas with Diverse Ecosystems in Viet Nam	G-012299-001
Country:	Internal order:
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0. List of abbreviations

DAE	Department of Agriculture and Environment
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
GTC	General Terms and Conditions of Contract for supplying services and work on behalf of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
MAE	Ministry of Agriculture and Environment
MEPA	Management and Protection of Protected Areas with Diverse Ecosystems in Viet Nam
PA	Protected Areas
PPC	Provincial People's Committees
RMO	Risk Management Office
ToRs	Terms of reference
VNFOREST	Department of Forestry and Forest Protectio

1. Context

Project context

This section provides a summary of the context, objectives and design of the project Management and Protection of Protected Areas with Diverse Ecosystems in Viet Nam (MEPA). For more details please refer to Annex A (Excerpts of the module proposal to the donor, the German Federal Ministry for Economic Cooperation and Development - BMZ).

Viet Nam is one of the 20 regions in the world with the highest biodiversity. Intact and diverse ecosystems are key for climate protection. Protected areas in Viet Nam cover a wide range of ecosystems, including various types of forests, wetland or marine areas. Many people living in rural areas, including ethnic communities, depend on the services provided by healthy ecosystems to secure their livelihoods. At the same time, the country's resource-intensive economic development model steadily increases pressure on ecosystems. Exploitation, industrial or tourist development harm protected areas. This resulted for example in a large part of the natural forests being degraded. Responsibilities for the regulatory framework or for strengthening capacities of protected areas are allocated to different government agencies. Moreover, until now protected area administrations in Viet Nam face a lack of resources, including finances or qualified staff for the tasks of conservation. These factors make it challenging to ensure an integrated and effective management of protected areas with diverse ecosystems.

Funded by the German Federal Ministry for Economic Cooperation and Development (BMZ), the project "Management and protection of protected areas with diverse ecosystems in Viet Nam" (MEPA project for short) has officially started in 01/2025 with the major part of the implementation taking off in 2026. It involves diverse state actors, including the *Ministry of Agriculture and Environment* (MAE) as a political partner, the *Department of Forestry and Forest Protection* (VNFOREST) as implementation partner, the *Department of Agriculture and Environment* (DAE), *Provincial People's Committees* (PPC) and the *Protected Area Management Board* of three pilot areas (Hoang Lien National Park, Van Long Nature Reserve and Xuan Lien National Park) located in three provinces (Lao Cai, Ninh Binh, Thanh Hoa).

The MEPA project aims to enhance regulatory, institutional and technical capacities for implementing integrated management of protected areas among the responsible authorities and the local population. The project interventions focus on:

- Output 1: Improving the regulatory framework for an integrated management of protected areas in general and in three selected areas through the development of technical guidelines and capacity building for integrated management of special-use forests
- Output 2: Identification and piloting of sustainable financing mechanisms
- Output 3: Development of ecosystem restoration plans and provide support on ecosystem restoration for selected special-use forests
- Output 4: Advancing the capacities of the management authorities and local communities of the selected special-use forests are improved for the planning and implementation of sustainable, community-based tourism.

The collaboration with the management boards of the three protected areas, as well as with the provincial and national authorities will ensure sustained technical capacity building results as well as advancing the overall regulatory and institutional framework. Potentials for fostering gender equality are used throughout all activities.

The effective management and protection of Viet Nam's diverse protected areas requires coordinated, multi-level interventions and the application of internationally recognised technical expertise. The MEPA project is in the process of completing essential preparatory steps to ensure that technical activities can commence without delay once the project receives approval from the Vietnamese authorities.

Scope and context of the international tender

In order to ensure the effective implementation of integrated management approaches for protected areas with diverse ecosystems, the project requires comprehensive technical expertise, innovative solutions, and alignment with global best practices. Given the complexity of protected area management — including conservation finance for protect areas, digital approaches to capacity building and biodiversity monitoring, forest carbon, ecosystem restoration, and community-based tourism — the project demands highly specialised knowledge that often extends beyond domestic expertise and resources.

Therefore, an international tender is launched to mobilise qualified expertise with extensive experience in the above-mentioned fields in line with international standards and best practices. The international contractor will provide technical assistance, facilitate capacity building, and introduce international standards and methodologies in protected area management. The contractor will be required to have profound understanding of the Vietnamese context and actors in the biodiversity conservation sector to match international best practices to local needs and systems. This ensures that the project not only strengthens institutional and technical capacities within Viet Nam, but also embeds globally recognised, sustainable, and inclusive management practices for long-term conservation impacts.

2. Tasks to be performed by the contractor

2.1 Term

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

2.2 Objectives, indicators, work packages, milestones

The contractor contributes to achieving the outcome and three outputs (outputs 1, 3, and 4) through delivering on selected indicators and task packages. The contractor is fully responsible for delivering on one output (output 2) described in this document.

Module objective: The regulatory, institutional and technical capacities for the implementation of integrated management of protected areas have been improved among the responsible authorities and the local population

Module objective indicator(s)

1. Two Policy instruments for the integrated management of protected areas have been adopted by the responsible authorities.

Baseline: 0 Policy instruments (existing policy instruments do not target integrated management of protected areas in a differentiated way)

Target: 2 policy instruments adopted.

2. The implementation of 2 participatory plans for the restoration of ecosystems taking into account carbon sequestration is initiated by the protected area authorities.

Baseline: 0 plans in implementation (so far there are no plans to restore ecosystems in protected areas)

Target value: 2 plans in implementation

3. 100 participants, 50 of them women, of training courses on sustainable, community-based tourism confirm that they apply the knowledge they have acquired in the marketing of products related to the protected areas.

Base value: 0 participants (no information is available on training courses specific to community based tourism in the selected areas)

Target value: 100 participants (50% of them women)

Output 1. The knowledge base on regulatory and technical aspects of integrated protected area management has improved among the responsible authorities

Output indicators:

- 14 needs analyses for the design of policy instruments for the integrated management of protected areas were completed in multi-stakeholder processes.
- Baseline: 12 needs analyses on protected area management since the enactment of the new Forestry Act (2018)
- Target value: 13 needs analyses

Three institutionalised training modules for integrated management of protected areas have been used in training courses for personnel responsible for the management of protected areas at different organisational levels.

- Baseline: 1 institutionalised training module
- Target value: 3 institutionalised training modules

Output 2: For selected protected areas, options for sustainable financing for integrated management have been identified.

Output indicators (all):

For 5 protected areas, sustainable financing plans for integrated management have been developed by the responsible protected area authorities.

- Base Value: 2 Protected Areas
- Target value: 5 protected areas

Two models for mobilising funding outside the regular state allocations for the management of one of the selected protected areas has been developed for use by the responsible protected area authorities.

- Baseline: 1 model (model for leasing forest ecosystem services for tourism)
- Target value: 2 models

Output 3: Ecosystem restoration plans are developed with the participation of the local population and using methods to assess the expected carbon sequestration for selected protected areas.

Selected output indicator:

For a forest ecosystem in a selected protected area, the existing carbon storage including the potential additional carbon sink capacity is calculated as an example.

- Baseline: Calculated carbon storage for 0 forest ecosystems (ecosystem-specific data to calculate carbon storage and sink performance are not available)
- Target value: Calculated carbon storage for 1 forest ecosystem

Output 4: The professional capacities of the administration and residents of selected protected areas for the planning and implementation of community-based, socially and environmentally compatible tourism have improved.

Selected output indicator:

One Method for assessing the social and environmental compatibility of tourist use in and around protected areas has been developed.

- Baseline: 0 Method (currently there is no specific method for assessing the social and environmental impact of tourist use for protected areas)
- Target value: 1 method

Further indicators:

- Amount of reduced or avoided greenhouse gas emissions [in tonnes of CO₂ equivalent/year]

The contractor is responsible for providing the following work packages (WP) and for achieving the corresponding milestones.

The requested services of the work packages do not include programming or adjustment of software.

WP1 on Output 1:

The objective of this output is to improve the knowledge base among the responsible authorities on regulatory and technical aspects of integrated protected area management. *Note: Training approaches and modules are tested and applied under Output 2 while their standardisation and institutionalisation are part of Output 1.*

GIZ oversees implementing Output 1. The contractor will provide contributions in the form of task packages and deliverables oriented towards realization of 'Milestones for work package 1/Output 1' in close coordination with GIZ. Prior to the commencement of each task package or deliverable, the contractor shall submit a proposed implementation concept defining the scope of work, methodology, sequencing, and allocation of expert inputs and resources. Implementation shall proceed following alignment with GIZ based on this concept..

GIZ's own contributions include coordination with relevant political and implementing partners, other development partners; participation in stakeholder consultations, working groups, and technical exchanges. GIZ further will specify together with VNFOREST the topics for regulatory adjustments in the coming 2 years in Viet Nam that will be addressed through international expertise provided under this contract. The studies carried out by the contractor will be used as technical expert input to the multi-stakeholder processes and hence need to be developed with this target in mind. The institutionalisation of the training module (topic to be defined together based on actual needs) has to be done with national service providers in the area of capacity development in Viet Nam, that have the mandate and resources for continued scaling and / or having the training module ready for different targets audiences for self-study.

Milestones for work package 1/Output 1	Delivery period after contact award
Study for informing advancing policy instruments for the integrated management of protected areas in Viet Nam.	6 months
Specialised studies reviewing international experience / good practice for regulatory frameworks facilitating integrated management of protected areas for potential national adoption (as input to on-going processes in Viet Nam).	12 months
Partial achievement of output indicator 1.1:1: 2 Needs analysis for the design of policy instruments for the integrated management of protected areas were completed in multi-stakeholder processes.	12 months
1 executive summary of available studies related to trainings in Viet Nam on integrated management of protected areas.	3 months
Based on insights from initial trainings on conservation finance (see Output 2), develop, standardise, and digitalise training curriculum on conservation finance (comprehensive, target group specific).	15 months
1 digital training module on conservation finance is available online as partial achievement of output indicator 1.2. One institutionalised training module for integrated management of protected areas has been used in	20 months

training courses for personnel responsible for the management of protected areas at different organisational levels.	
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WP2 on Output 2:

The objective of this output is to strengthen protected area management boards' capacities for financial planning and management as well as to mobilise additional investment for biodiversity conservation.

- Analysis of the current financial capacity, gaps, and needs of the three pilot PAs in responding to their management and protection tasks and responsibilities. This will include the review and analysis of all available fundings and the efficiency in use of current financial resources applying the Protected Area Financing Self-Assessment (PAFSAT).
- Develop sustainable financing “models” through plans and roadmaps for three pilot PAs including identifying potential additional sources of finance for the PA management and protection and how to mobilise/access it. A focus lies on private sector cooperation.
- Coaching, training, and facilitated expert exchanges during the entire assessment, planning and model implementation. This may include but is not limited to theory and practice of financial management, accounting, monitoring and reporting; fund raising, application writing, and negotiation. Capacity building measures are based on PA's needs and PA specific training plans are to be developed and implemented. *Note: the standardisation and institutionalisation of digital training models are taking place under Output 1.*
- Prepare contents for the self-learning training curriculum on sustainable financing to incorporate into the digitalized training modules of the project.
- Standardise reporting and accounting systems according to the requirements and regulations of donors/investors for the pilot protected area. Equip each pilot PA with an up-to-date accounting software if necessary.
- Monitor and evaluate the financial management capacity as well as progress in resource mobilisation of each pilot PA by the project end to see the impact.

Output 2 is outsourced in its entirety. The contractor is fully responsible for delivery of results. Prior to the commencement of each related task package or deliverable oriented towards realization of 'Milestones for work package 2/Output 2', the contractor shall submit a proposed implementation concept defining the scope of work, methodology, sequencing, and allocation of expert inputs and resources – Implementation shall proceed following agreement with GIZ, VNFOREST and the (three) selected pilot protected area's management boards.

A model for mobilising financial resources is developed, including a roadmap displaying the necessary short-term and long-term steps to operationalise the model. Such a model could, for example, comprise cover the use of carbon and biodiversity market options, the negotiation of payments from the private sector within the framework of corporate social responsibility (CSR), the adoption of payment for ecosystem services (PES) beyond the already established mechanism for the payment of forest ecosystem services (PFES) for other ecosystems, as well as the generation of revenues from tourism for protected area management, e.g. through levies, fees, usage licenses or compensation mechanisms. Designed for application in the sense of the indicator means that potential contractors for financing identified jointly with the local protected area authority of the selected area (e.g. investor, donor, company, provincial administration) are identified, as well as the

conditions for implementing the financial flows negotiated between the contracting parties. The contractor should evaluate the model with regard to its readiness for use in the 3rd year of implementation.

GIZ's own contributions include coordination with relevant political and implementing partners, other development partners; participation in stakeholder consultations, working groups and technical exchanges on the topic of conservation finance. GIZ further provides a site coordinator per province, who should be informed and can be involved in activities at protected area level. Since conservation finance is a long-standing field technical cooperation between Germany and Viet Nam, previous experiences and available approaches should be built upon (see for instance [Conservation forest – Sustainable financing for protected areas – snrd-asia¹](https://snrd-asia.org/conservation-forest-sustainable-financing-for-protected-areas/)). For digital training platforms, GIZ will advise on possible platforms and formats including, but not limited, to Atingi and mobile phone-based learning apps.

Milestones for work package 2 / Output 2	Delivery period after contract award
3 financial analysis / PAFSAT of 3 PAs conducted.	3 months
Partial achievement of output indicator 2.1: For 2 protected areas, sustainable financing plans for integrated management have been developed by the responsible protected area authorities.	12 months
Assessment of concrete opportunities for all PAs following the legal framework in Viet Nam, potential financing partners and/or financing streams for all 3 sites.	12 months
Detailed financing model development and coaching of selected PA for implementation of model (access financing).	15 months
Partial achievement of output indicator 2.2: 1 model for mobilising funding outside the regular state allocations for the management of one of the selected protected areas has been developed for use by the responsible protected area authorities. The model is comprehensively documented and supplemented by roadmaps for selected pilot financing option for up to 3 PAs.	18 months
Review report on current accounting and financial management capacity and workflow of 3 PAs with recommendations for improvements.	6 months
3 monitoring systems, including integration of digital solutions for accounting and financial tracking procedures, for the use of funds and review of due diligence aspects are established at MBs of PA.	20 months
3 training and coaching plans for capacity building on conservation finance for 3 PAs are agreed upon.	6 months
1 domestic exposure visit on conservation finance conducted.	15 months

¹ <https://snrd-asia.org/conservation-forest-sustainable-financing-for-protected-areas/>

3 series of trainings and coaching sessions are conducted with 3 PAs and other relevant staff on all relevant aspects of conservation finance.	20 months (continuous implementation from the beginning)
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WP3 on Output 3:

The objective of this output is to advance ecosystem restoration including the halting and reversing ecosystem degradation or unsustainable resource use in protected areas. This should be achieved through participatory, multi-stakeholder and cross-sectoral approaches.

GIZ oversees implementing Output 3. The contractor will provide contributions in the form of task packages and deliverables oriented towards realization of 'Milestones for work package 3/Output 3' in close coordination with the GIZ. Prior to the commencement of each task package or deliverable, the contractor shall submit a proposed implementation concept defining the scope of work, methodology, sequencing, and allocation of expert inputs and resources. Implementation shall proceed following alignment with GIZ based on this concept.. As the basis of this, a preparatory study was carried out producing recommendations for activities in the field of forest carbon (see Annex C). This study builds the basis for forest carbon activities in the MEPA project and must be taken into account by the bidder. GIZ's own contributions include coordination with relevant political and implementing partners, other development partners; participation in stakeholder consultations, working groups and technical exchanges on the topic of ecosystem restoration. GIZ further provides a site coordinator per province, who must be informed and can be involved in activities at protected area level. For the standard indicator, GIZ will provide the contractor with an overview of relevant project activities that should be considered in the calculation of greenhouse gas emission reductions across the entire project.

Milestones for work package 3/Output 3	Delivery period after contract award
1 study on ecosystem degradation risk / deforestation risk is carried out.	6 months
Achievement of output indicator 3.1: For a forest ecosystem in a selected PA, the existing carbon storage including the potential additional carbon sink capacity is calculated as an example. Here, an approach using digital tools (drones, remote sensing) is to be developed and tested.	12 months
Carbon stock assessment method is standardized for the prevalent eco-system in the PA and available as an input / advancement of the national forest MRV.	15 months
Conduct eligibility and (pre-)feasibility study for a potential forest carbon project against eligible standards and active methodologies for one PA, indicating costs, revenue and risks.	15 months
Input for standard indicator: The amount of reduced or avoided greenhouse gas emissions through all relevant project activities are calculated on annual basis.	Once for 2027 in 01/2028 and once for 2028 in 06/2028

Development of recommendations and concrete road map with options for financing to advance digital approaches at PA level for forest monitoring and data analyses.	18 months
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WP4 on Output 4:

The objective if this output is to improve the professional capacities of the administration and residents of selected protected areas for the planning and implementation of community-based, socially and environmentally compatible tourism.

GIZ oversees implementing Output 4. The contractor will provide contributions in the form of task packages and deliverables oriented towards realization of 'Milestones for work package 4/Output 4' in close coordination with the GIZ. Prior to the commencement of each task package or deliverable, the contractor shall submit a proposed implementation concept defining the scope of work, methodology, sequencing, and allocation of expert inputs and resources. Implementation shall proceed following alignment with GIZ based on this concept.. GIZ's own contributions include coordination with relevant political and implementing partners, other development partners; participation in stakeholder consultations, working groups and technical exchanges. The input of the contractor focuses on international good practice for socially and environmentally responsible community-based tourism in and around protected areas. This input will be used to develop a tourism impact assessment methods for the context in Viet Nam and to inform training module development.

Milestones for work package 4/Output 4	Delivery period after contract award
1 summary of best international practices on socially and environmentally responsible community-based tourism in and around protected areas is developed, which includes documented good as well as replicable examples from Southeast Asia.	6 months
Development of approach for assessing social and environmental compatibility of tourist development in and around PAs Viet Nam.	8 months
Assessment of existing training materials and trainings on community-based tourism conducted against international best practice. Provision of peer-review of training materials prepared by the MEPA project.	12 months
Partial achievement of output indicator 4.1: 1 Method for assessing the social and environmental compatibility of tourist use in and around protected areas has been developed.	12 months

2.3 Project and knowledge management requirements

Requirements on the assignment of experts:

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

Requirements on materials and equipment and operating costs:

- The contractor makes the required materials, equipment and consumables available and covers their operating and administrative costs.

Requirements on expenditure management and cost control:

- The contractor manages costs and expenditures, accounting processes and invoicing in line with GIZ requirements.
- Regular expenditure planning from annual to quarterly or pre-invoice basis are required. Sufficient and timely resources by an accountant/financial controller from the contractor's side is to be ensured. The contractor shall update its plan and expenditure on a monthly basis and share with GIZ.
- Information on cost-output monitoring (KOMP): The contractor ensures that the output allocation of a work package and corresponding (planned) expenditures are always clarified, monitors and documents this in its expenditure reporting, planning and invoicing.

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 2.2 of these ToRs have been achieved
 - Results that have occurred in the contractor's sphere of responsibility including qualitative and quantitative data
 - Results that have occurred outside the contractor's direct sphere of responsibility (cascading and scaling effects, information concerning other aspects of the project not part of this ToR, media echo, events relevant to the contractor's duties, feedback from partners or target group on project implementation)
 - Risks to reaching the objectives outlined in these ToRs including significant delays as well as other risks and unintended negative impacts in line with the project's understanding of safeguards and gender (see section 2.5 of these ToRs)
 - Results in line with requirements of BMZ's standard indicators
 - Progress monitoring data including, but not limited to number of participants disaggregated by gender and ethnic group, dates and locations of activities, routing of travels and trips, consent forms for use of audio & video materials
 - Lessons learnt and recommendations for future modules in this sector
 - Risks and potentials to contribute to promoting safeguards and gender equality (see chapter 2.5)

The contractor reports to GIZ as follows:

Instead of the reporting language stipulated in GIZ's General Terms and Conditions of Contract (German), the contractor provides the following reports in the following language: English (British English). Upon the partner's request a Vietnamese translation of reports will be required.

- Inception report: up to 10 pages due 2 months after the contract commenced.
- Interim report(s) every 6 months
- Final report on the date of the contract expiration.

The interim report(s) and the final report should provide information about the progress made towards objectives in each of the monitoring areas specified above.

Additionally, the contractor is required to produce:

- Brief activity or work package reports on the implementation status of the project within one week after completion of the activity (up to 5 pages)

Requirements for company-wide learning, knowledge and innovation:

- Contributions to conferences and study tours in the frame of the project and the German-Vietnamese technical cooperation in the sector such as
 - Conferences: annual protected area conference, project kick-off and closing conferences, others as agreed with partners.
 - Study tours: local exposure visit and expert exchanges on conservation finance
- If required, the contractor provides support in implementing a project evaluation with special emphasis on ensuring the effectiveness of the knowledge management process.
- The contractor expresses willingness, if required, to support project assistants or staff members on temporary placements who, in the context of GIZ's separately financed training programmes for junior employees, work in and undertake special tasks for the project.

Backstopping requirements:

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

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

2.4 Data protection and information security

The provisions on data protection and information security of the current version of GIZ's General Terms and Conditions of Contract (sections 1.7 Confidentiality, 1.11 Data protection) apply.

The performance of the contract may be associated with the processing of personal data by the contractor, such as (but not limited to) names and contact information. In such cases, the

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

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

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

2.5 Other requirements

Safeguards and gender measures with specific reference to services:

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

Gender equality:

- Considering the MEPA project gender analysis (see annex B) and gender action plan (to be developed by GIZ and partners) throughout all activities
- Advising the protected area authorities to include gender aspects in the negotiation of conditions with potential contractual partners (e.g. recruitment of female labours, social & gender safeguarding, equal pay etc);
- Ensuring women's participation in trainings, consultations and events and consideration of women's concerns in training design and delivery;

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

- The integrated approach to protected area management increases management efficiency and improves ecosystem protection. The preservation of protected areas and their greenhouse gas reservoirs thus contribute to the climate goals. At the same time, the project expands the methodological capacities in the partner system for the restoration of ecosystems in a nature-based approach. The contractor shall be guided by the dual environmental benefits for biodiversity and climate change mitigation/adaptation.

Conflict sensitivity:

- The restoration of degraded ecosystems can mean a loss of income for people who have so far participated in the unregulated, e.g. illegal use of the protected areas. To

reduce risk, the contractor shall plan restoration measures in participatory processes with a focus on socially acceptable solutions.

Human rights:

- While there are human rights concerns in Vietnam, some of which are related to the wider context of the project, the MEPA project is unlikely to cause additional unintended negative impacts in these areas or to contribute to the entrenchment of existing issues.
- However, the contractor is required to regularly reflect on potential issues of discrimination of women and ethnic minorities, especially since the planned policy and planning components of the project offer significant potential to improve their situation through planned regulatory processes and/or capacity building in relevant administrative bodies.
- Ensuring the effective participation of different ethnic groups in trainings, consultations and events and consideration of different concerns and languages in training design and delivery.

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

Compliance with Vietnamese registration and tax requirements

The tenderer must be legally registered and authorized to operate in Viet Nam and comply with all applicable national laws and regulations. This includes possessing a valid business registration or license permitting the proposed scope of services and a valid Vietnamese Tax Identification Number (TIN). International bidders may fulfil these requirements through a duly registered local entity, branch, or through a consortium or joint venture with a locally registered firm, provided that at least one consortium partner is legally registered in Viet Nam and holds a valid business license and Tax Identification Number (TIN) covering the proposed scope of services.

3. Technical-methodological concept

In this section, the tenderer is required to reflect on the objectives and terms of reference of the tender at hand, describe the partner system and its processes in the area of responsibility and present the technical-methodological concept for completing the tasks listed in section 2 and achieving the set objectives. In addition, the tenderer must describe the design of the project management process.

3.1 Interpretation of objectives (section 1.1 of the assessment grid)

The tenderer is required to interpret the objectives for which it is responsible. Simple repetition of the objectives formulated in section 2 of the ToRs is not desired. Rather, the contractor is to describe and interpret the changes in the partner system that are to be directly achieved by the object of the tender procedure. The resulting positive impact on the partner system (section 1.1.1 of the assessment grid) should also be presented.

The contractor must undertake a critical examination of the ToRs (section 1.1.2 of the assessment grid), by:

- Undertaking an assessment of the appropriateness of the personnel concept for implementing the scheduled tasks;
- Providing an assessment of the results hypotheses for achieving the objectives and possible risks in implementation;
- Making an assessment of the technical concept, e.g. in consideration of further sectors or actors, safeguards etc.

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

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

The tenderer is required to describe, using existing documents where possible (see annexes), the processes in the sector or partner system that are relevant to the services put out to tender (section 1.2.1 of the assessment grid).

The tenderer is required to present the actors (partners and others) who are relevant for the tender in the form of a map of actors. As far as possible, it should list the actors by name. Their mandates as well as strengths, weaknesses and interests with respect to the services put out to tender are also to be briefly presented (section 1.2.2 of the assessment grid).

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

3.3 Strategy (section 1.3 of the assessment grid)

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

- Procedure for achieving the objectives stated in section 2.2 of these ToRs
- Development of partnerships with the relevant actors
- Approaches for leverage effects and measures for scaling-up
- Consideration of environmental and social compatibility requirements (including gender equality)
- Appropriate consideration of further requirements

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

The tenderer is required to describe and justify the approach it plans to adopt in order to achieve the milestones, objectives and results (see section 2) for which it is responsible.

Following the working areas, objectives and tasks outlined in in section 2 of these ToRs, the tenderer should describe and justify the implementation strategy with a description of important activities with which they intend to achieve the milestones, objectives and results for which they are responsible. Specifically for output 2, which is under the full responsibility of the tenderer, a comprehensive implementation approach including lines of action should be presented. For other working packages, the interlinkages and contributions to achieving the expected milestones and results should be described. Duplication with the presentation of other sections in chapter 3 should be avoided.

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

The tenderer is required to develop and describe a strategy for developing the cooperation with the actors in the partner system who are relevant for the implementation of the services in the tender. The project partnerships already mentioned in section 1 must also be taken into account.

The tenderer will put particular focus at the cooperation at site level (protected area) in its area of responsibility. Coordination with GIZ is covered in section 3.4.2 and overlap should be avoided.

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.

Here, the tenderer needs to outline how scaling up and knowledge continuity at the level of GIZ as an institution, at partners and for the wider development community can be ensured. The tenderer should explain how this will be considered from the beginning of the implementation as an integral part of the conceptualisation of activities and the approach for implementation, monitoring and follow-up after milestones have been achieved.

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

Gender equality

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

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

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

Overlap with intended project results as to environmental and climate should be avoided. Instead, this section should focus on how to harness co-benefits and prevent negative unintended impacts.

Conflict and context sensitivity

The tenderer is required to outline in the tender how it is planning its activities in the context of conflicts or violence and what specific measures it has adopted for conflict- and context-sensitive implementation (see also relevant requirements in section 2.5).

Human rights

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

This includes considerations as to ethnicity, age, sexual orientation, and different abilities.

Requirement: 'Gender equality':	3 points out of 10 (maximum)
Requirement: 'Environmental protection and climate action (climate change mitigation/adaptation)':	3 points out of 10 (maximum)
Requirement: 'Conflict and context sensitivity':	2 points out of 10 (maximum)
Requirement: 'Human rights':	2 points out of 10 (maximum)

3.4 Project management (section 1.4 of the assessment grid)

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

3.4.1 Operational plan

(section 1.4.1 of the assessment grid)

The tenderer is required to draw up and explain an operational plan for implementing the strategy described in section 3.3, including a plan for the assignment of all the experts included in the tender. The operational plan must include the assignment times (periods and expert days) and assignment locations of the individual experts, the milestones as presented in section 2 and, in particular, describe all the necessary work stages in detail and in chronological order. The tenderer can define further milestones beyond those prescribed in section 2 and map them out in the plan of operations.

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.

3.4.3 Steering or coordination of measures with the relevant implementing partner

(section 1.4.3 of the assessment grid)

– Not applicable –

3.4.4 Monitoring

(section 1.4.4 of the assessment grid)

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

3.5 Further requirements

(section 1.5 of the assessment grid)

- The tenderer is required to explain and, as far as possible, provide specific evidence of how it will make use of national resources (for example national institutions, network partners etc.) in the context of service delivery.
- The tenderer is required to describe its backstopping strategy. A CV must be provided for the positions for technical and financial backstopping.

Requirement: use of national resources: 3 points out of 10 (max.)

Requirement: backstopping strategy: 7 points out of 10 (max.)

4. Personnel

The tenderer is required to provide 'experts' for the positions referred to and described (scope of tasks and qualifications) in this section on the basis of corresponding CVs.

The requirements on the format and content of the CVs are described in section 6.

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

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

4.1 Expert 1: Team leader (section 2.1 of the assessment grid)

This position is a **key expert**.

Tasks of expert 1: (team leader)

- Overall responsibility for the advisory packages of the contractor
- Ensuring the coherence and complementarity of the contractor's services across different outputs and experts, and with other services delivered by the project at local and national level
- Steering and management of output 2, especially coherence with other outputs and activity packages such as forest carbon as financing option, community-based tourism as financing option, standardised trainings
- Management (onboarding, quality assurance) of experts under the pools including kick-off meetings, follow-up on timeline, review of deliverables
- Management and quality assurance of the standardised digital training curriculum (output 1)
- Responsibility for taking cross-cutting themes into consideration (for example, gender equality)
- Staff management, in particular identifying the need for short-term assignments within the available budget, planning and managing the assignments and supporting experts
- Ensuring that monitoring procedures are carried out
- Regular reporting in accordance with deadlines
- Budget planning and monitoring. Responsibility for checking the use of funds and financial planning in consultation with the commission manager at GIZ
- Ensuring compliance with partner requirements, permits, and communication flow
- If the necessity arises, supporting the commission manager in updating and/or adapting the project strategy, in evaluations and in preparing a follow-on phase

Qualifications of expert 1: (team leader)

Education/training (section 2.1.1 of the assessment grid):	University degree (master's) in forestry, environmental/natural resource management, biodiversity, sustainable development
Language (section 2.1.2 of the assessment grid):	English language skills, level C1 in the Common European Framework of Reference for Languages (CEFR) (4 out of a possible 10 points) German language skills, level C2 in the CEFR (3 out of a possible 10 points)

	Vietnamese language skills, level C1 in the CEFR (3 out of a possible 10 points)
General professional experience (section 2.1.3 of the assessment grid):	6 years of professional experience in the sector forests and biodiversity (6 out of a possible 10 points) 2 years of professional experience in the development of Sustainable Forest Management Plans including Financing Plans for Protected Areas (4 out of a possible 10 points)
Specific professional experience (section 2.1.4 of the assessment grid):	6 years of professional experience in international project management
Leadership/management experience (section 2.1.5 of the assessment grid):	6 years of management experience in projects, companies or other organisations with disciplinary leadership responsibility for 10 or more people
International professional experience outside the country/region of assignment (section 2.1.6 of the assessment grid):	<i>Not applicable</i>
Professional experience in the country/region of assignment (2.1.7 of the assessment grid):	5 years of professional experience in Vietnam
Experience in the field of development cooperation (section 2.1.8 of the assessment grid):	6 years of experience in development cooperation projects
Other (section 2.1.9 of the assessment grid):	6 years of professional experience in financial management of projects

4.2 Expert 2: Conservation finance expert (section 2.2 of the assessment grid)

This position is a **key expert**.

Tasks of expert 2: Conservation finance expert

- Provide substantial technical contributions to the design of the overall work package on conservation finance (Output 2 and Output 1)
- Conduct the analysis of the current financial capacity, gaps and needs of the three pilot PAs in responding to their management and protection tasks and responsibilities with the use of PAFSAT. Assess accounting system.
- Provide technical support to three pilot PAs in the development of the sustainable financing plan and roadmap to access financing.
- Provide technical support in the development of training modules, implement trainings in person and via digital solutions for capacity development in sustainable financing topics, adaptive improvement of training modules and standardisation of (digital) training curriculum
- Take lead in the design of the study tour for three PAs to other sites learning about sustainable financing.
- Take lead in the design of financing models for the three pilot PAs, coach PAs in accessing finance. Coordinate with (short-term) experts on forest carbon as financing option.

- Coordination with the provincial level (DAE, PA Management boards) for relevant activities.
- Close coordination with specialist 3 on forest carbon monitoring to assess feasibility of forest carbon project as financing model and identify financing for digital approaches in forest monitoring supporting the 3 PAs.

Qualifications of expert 2. Conservation finance expert

Education/training (section 2.2.1 of the assessment grid):	University degree (master's) in finance, (environmental) economics, business
Language (section 2.2.2 of the assessment grid):	English language skills, level C1 in the CEFR (5 out of a possible 10 points), Vietnamese language skills, level C2 in the CEFR (5 out of a possible 10 points)
General professional experience (section 2.2.3 of the assessment grid):	8 years of professional experience in the sector of finance; acquired within the last 8 years
Specific professional experience (section 2.2.4 of the assessment grid):	4 years of professional experience in forests and biodiversity (6 out of a possible 10 points), 2 years of professional experience in developing sustainable financing plans for protected areas (4 out of a possible 10 points)
Leadership/management experience (section 2.2.5 of the assessment grid):	<i>-not applicable-</i>
International professional experience outside the country/region of assignment (section 2.2.6 of the assessment grid):	<i>-not applicable-</i>
Professional experience in the country/region of assignment (2.2.7 of the assessment grid):	5 years of professional experience in Vietnam
Experience in the field of development cooperation (section 2.2.8 of the assessment grid):	8 years of experience in development cooperation projects
Other (section 2.2.9 of the assessment grid):	2 years of professional experience integrating digital solutions for accounting and financial tracking procedures in the management of protected areas.

4.3 Expert 3: digital forest carbon monitoring expert (section 2.3 of the assessment grid)

This position is a **key expert**.

Tasks of expert 3: digital forest carbon monitoring expert

- Calculate carbon storage including the potential additional carbon sink capacity in selected areas and test using digital tools (drones, remote sensing) for monitoring.

- Conduct eligibility and (pre-)feasibility study for a potential forest carbon project against eligible standards and active methodologies for one PA, indicating costs, revenue and risks.
- Standardise carbon stock assessment method. Process information to serve as input / advancement of the national forest MRV and deliver inputs at relevant meetings / into documents.
- Conduct calculations and rationality for the input for standard indicator: The amount of reduced or avoided greenhouse gas emissions through all relevant project activities are calculated on annual basis
- Work closely with expert 2 on the development of recommendations and concrete road map with options for financing to advance digital approaches at PA level for forest monitoring and data analyses
- Conduct training and coaching on forest carbon for three PAs / provinces and policy makers at national level
- Provide assessments and reviews on international and domestic regulations, systems with regard to forest carbon, carbon trade as requested by the project

Qualifications of expert 3. digital forest carbon monitoring expert

Education/training (section 2.3.1 of the assessment grid):	University degree (master's) in environment, forestry, climate change
Language (section 2.3.2 of the assessment grid):	English language skills, level C1 in the CEFR (5 out of a possible 10 points) Vietnamese language skills, level C2 in the CEFR (5 out of a possible 10 points)
General professional experience (section 2.3.3 of the assessment grid):	8 years of professional experience in the sector of forest carbon
Specific professional experience (section 2.3.4 of the assessment grid):	8 years of professional experience in forest monitoring using digital tools (remote sensing, drones)
Leadership/management experience (section 2.3.5 of the assessment grid):	<i>-not applicable-</i>
International professional experience outside the country/region of assignment (section 2.3.6 of the assessment grid):	<i>-not applicable-</i>
Professional experience in the country/region of assignment (2.3.7 of the assessment grid):	5 years of professional experience in Vietnam related to the tasks of this position
Experience in the field of development cooperation (section 2.3.8 of the assessment grid):	3 years of experience in development cooperation projects
Other (section 2.3.9 of the assessment grid):	2 years of experience in using VERRA and/or Gold Standard forest carbon standards.

4.4 Expert 4 Expert Pool 1: “Senior short-term experts” with 6 experts (section 2.4 of the assessment grid)

This expert pool contains several profiles a) to f) (see below). A CV for each expert must be added to the tender.

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

Tasks of the expert pool 1: “Senior short-term experts”

- Advising on the identification and mobilization of **financing** for conservation and PA management with a focus on the private sector, promoting the exchange of international experiences and best practices for application in Vietnam.
- Studies and expert advice on ecosystem **restoration** including successful community-based models, financing restoration, monitoring and evaluation restoration success.
- Studies and international best practices on environmentally and socially responsible community-based **tourism** models including financial benefits.
- Advising on and developing **digital training models** for e-learning platforms and hand-held devices on forest and biodiversity topics, especially conservation finance.
- Advising on the application of digital tools and technology in forest resource, carbon and biodiversity management and **monitoring**.
- Studies reviewing international experience / good practice for regulatory frameworks facilitating **integrated management of protected areas** for potential national adaptation (as input to on-going processes in Viet Nam)

Qualifications of the expert pool 1: “Senior short-term experts”

Education/training (section 2.4.1 of the assessment grid):	<ul style="list-style-type: none"> a) 1 expert with a university degree (master’s) in finance, business, environmental economics (2 out of 10 points) b) 1 expert with a university degree (master’s) in biodiversity conservation, protected area management, natural resources management, landscape architecture (2 out of 10 points) c) 1 expert with a university degree (master’s) in climate change studies, sustainable development studies (1 out of 10 points) d) 1 expert with a university degree (master’s) in tourism (2 out of 10 points) e) 1 expert with a university degree (master’s) in forestry (2 out of 10 points) f) 1 expert with a university degree (master’s) in didactics, teaching, and/or UX design, computer sciences (1 out of 10 points)
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Language (section 2.4.2 of the assessment grid):	All experts with English language skills, level C1 in the Common European Framework of Reference for Languages
General professional experience (section 2.4.3 of the assessment grid):	a) 1 expert with 5 years of professional experience in the sector conservation finance (2 out of 10 points) b)-d) 3 experts with 7 years of professional experience in the sector forest and biodiversity (4 out of 10 points) e) 1 expert with 6 years of professional experience in the sector tourism (2 out of 10 points) f) 1 expert with 5 years of professional experience in the sector training & education (2 out of 10 points)
Specific professional experience (section 2.4.4 of the assessment grid):	a) 1 expert with 5 years of professional experience in private sector cooperation for nature conservation (2 out of 10 points) b) 1 expert with 5 years of professional experience in ecosystem restoration (2 out of 10 points) c) 1 expert with 5 years of professional experience in remote sensing, GIS (2 out of 10 points) 1 expert with 5 years of professional experience in community-based responsible tourism (2 out of 10 points) d) 1 expert with 5 years of professional experience in developing e-learning (2 out of 10 points) e) and f) : n/a
Leadership/management experience (section 2.4.5 of the assessment grid):	- not applicable-
International professional experience outside the country/region of assignment (section 2.4.6 of the assessment grid):	- not applicable-
Professional experience in the country/ region of assignment (2.4.7 of the assessment grid):	All experts having each 5 years of related professional experience in Vietnam
Experience in the field of development cooperation (section 2.4.8 of the assessment grid):	3 experts having each with 2 years of experience in development cooperation projects (5 out of 10 points) 3 experts having each with 7 years of experience in development cooperation projects (5 out of 10 points)
Other (section 2.4.9 of the assessment grid):	- not applicable-

4.5 Expert 5 Pool 2: “Short-term experts with local experience” with 7 experts (section 2.3 of the assessment grid)

This expert pool contains several profiles a) to g) (see below). A CV for each expert must be added to the tender.

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

Tasks of the expert pool 2: Policy advice, training, field assessments and outreach

- Analysis of the **impact of tourism** activities in PAs in general. Studies, field assessments and technical advice (establishing standards) on environmentally and socially responsible community-based tourism in three partnering PAs.
- Studies on the Vietnamese context and selected **policy** aspects to inform and advance policy instruments for the integrated management of protected areas.
- Studies and field assessments on conservation **finance** and accounting of PAMBs such as PAFSAT, natural capital accounting/ecosystem service assessment, PFES potential.
- Advising on the training need assessment and **capacity building** planning for different target groups from national, local to grassroot/community level. Provide technical support for the design of training curriculum and materials and impact assessment of capacity building activities. Deliver trainings.
- Advising and capacity development on **digital approaches** for effective and integrated PA management.
- Studies and expert advice on the creation and implementation of ecosystem **restoration** models, facilitating participatory approach with all relevant stakeholders at PA level
- Design and guide implementation of **outreach** and networking activities at the three protected areas with the communities and other relevant stakeholders on forest and biodiversity topics including, but not limited to tourism, finance, carbon, sustainable resource management and restoration.

Qualifications of the expert pool 2:

Education/training (section 2.5.1 of the assessment grid):	<ul style="list-style-type: none"> a) 1 expert with a university degree (master's) in tourism (1 out of 10 points) b) 1 expert with a university degree (master's) in finance, business, environmental economics, accounting (2 out of 10 points) c) 1 expert with a university degree (master's) in education, didactics (1 out of 10 points) d) 1 expert with a university degree (master's) in forestry (2 out of 10 points) e) 1 expert with a university degree (master's) in biodiversity conservation, protected area management, natural resources management (2 out of 10 points) f) 1 expert with a university degree (master's) in international policy, public administration (1 out of 10 points)
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	g) 1 expert with a university degree (master's) in communication, outreach, exhibition design (1 out of 10 points)
Language (section 2.5.2 of the assessment grid):	7 experts with English language skills level C1 in the CEFR (5 out of a possible 10 points) 7 experts with Vietnamese language skills level C2 in the CEFR (5 out of a possible 10 points).
General professional experience (section 2.5.3 of the assessment grid):	a) 1 expert with 5 years of professional experience in the sector tourism (1 out of 10 points) b) 1 expert with 7 years of professional experience in the sector conservation finance (2 out of 10 points) c) 1 expert with 8 years of professional experience in the sector training & education (2 out of 10 points) d + e) 2 experts with 8 years of professional experience in the sector forest and biodiversity (2 out of 10 points) f) 1 expert with 9 years of professional experience in the sector public policy, good governance (1 out of 10 points) g) 1 expert with 5 years of professional experience in the sector communication (2 out of 10 points)
Specific professional experience (section 2.5.4 of the assessment grid):	a) 1 expert with 5 years of professional experience in community-based responsible tourism (1 out of 10 points) b) 1 expert with 5 years of professional experience in natural capital accounting, ecosystem service assessments, PFES (1 out of 10 points) c) 1 expert with 5 years of professional experience in training delivery (2 out of 10 points) d) 1 expert with 5 years of professional experience in forest, carbon and biodiversity monitoring (2 out of 10 points) e) 1 expert with 5 years of professional experience in ecosystem restoration (1 out of 10 points) f) 1 expert with 5 years of professional experience in forest and nature conservation policy development (2 out of 10 points) g) 1 expert with 5 years of professional experience in community-based awareness raising (1 out of 10 points)
Leadership/management experience (section 2.5.5 of the assessment grid):	- not applicable-
International professional experience outside the country/region of assignment (section 2.5.6 of the assessment grid):	- not applicable-
Professional experience in the country/ region of assignment (2.5.7 of the assessment grid):	All experts with each having 7 years of related professional experience in Vietnam
Experience in the field of development cooperation (section 2.5.8 of the assessment grid):	4 experts each with 2 years of experience in development cooperation projects (5 out of 10 points)

	3 experts each with 7 years of experience in development cooperation projects (5 out of 10 points)
Other (section 2.5.9 of the assessment grid):	1 expert (expert b) with experience in implementation of digital solution for PA accounting system (5 out of 10 points) 1 expert with 5 years of experience in promoting environmental and social safeguards (5 out of 10 points)

The tenderer must assign all the proposed experts of the pools 1 and 2 to the required qualifications and clearly present them in a separate table preceding the CVs. The summary presentation must mention only qualifications that are actually indicated in the CVs. Professional experience must be evidenced by meaningful references in the CVs. It is advisable to make explicit reference to each example of professional experience.

Soft skills of team members

In addition to their specialist qualifications, all team members are also expected to have the following qualifications:

- Team skills
- Initiative
- Communication skills
- Sociocultural and intercultural skills
- Efficient partner- and client-oriented working methods
- Interdisciplinary thinking

Soft skills are not evaluated.

5. Costing requirements

In your tender, please do not deviate from the specification of inputs required in these ToRs (the number of experts and expert days, the budgets specified in the price schedule). This is part of the competitive tender and is used to ensure that the tenders can be compared objectively. Please note: only services that were commissioned by GIZ and rendered by the contractor will be remunerated. We would also like to point out that it may not be necessary to make use of the total number of proposed expert days.

5.1 Assignment of experts

In your tender, please do not deviate from the specification of quantities required in these ToRs (the number of experts and expert days, the budgets 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		144	144	No	4	48
Expert 2: conservation finance		288	288	No		
Expert 3: digital forest carbon monitoring		192	192	No		
Expert 4: Expert pool 1:	70	30	100	No	4	
Expert 5: Expert pool 2:		300	300	No		

5.2 National administrative staff

The following national administrative staff are needed:

1 office assistant with duties including contractual and logistic arrangements, interpretation and translation, accounting estimated for 21 months.

5.3 Travel expenses

5.3.1 Travel – sustainability considerations

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

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

There are many different providers in the market for emissions certificates, and they have different climate impact ambitions. The [Development and Climate Alliance](#) has published a

[list of standards](#) (only in German available). GIZ recommends using the standards specified there.

5.3.2 Travel expense requirements

The specified amounts are the maximum amounts the tenderer can include in the tender. In other words, the tenderer can also offer lower individual amounts.

Higher amounts must not be included in the tender.

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

Travel expenses item	Quantity	Max. budget per unit in EUR
Total number of international flights	8	2,000
Total number of regional/national flights	48	100
CO ₂ offsets for flights <i>An unalterable budget for CO2 offsets for settlement against evidence is specified in the price schedule.</i>	1	2,416.00
Transport costs (rail travel, car travel, public transport)	1	9,600
Per-diem allowances Vietnam	324	15.00
Accommodation allowances Vietnam	216	40.00
Other travel expenses (visa, project-related travel expenses outside the place of business etc.) airport transfers	1	1,200

Per-diem allowances are reimbursed as a lump sum up to the maximum amount indicated in the table above.

For the country Viet Nam, tenderers may offer accommodation allowances per night of up to EUR 40.00. 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

Budget for materials and equipment: EUR 23,000

(EUR 3,000 for laptops/office equipment and EUR 20,000 for restoration (EUR 10,000 per site for 2 sites))

The fixed, unalterable budget above is earmarked for the procurement of the materials and equipment described in the table below (payment against evidence).

All procurement of materials and equipment must be agreed in advance with the GIZ project manager.

Made available free of charge by GIZ for the duration of the contract: Meeting rooms at GIZ.

The contractor procures the following materials and equipment:

- Office furniture
- IT equipment
- Equipment for digital approach for monitoring, ecosystem restoration (yet to be selected);
- accounting software

5.5 Operating costs in the country of assignment

The contractor is required to specify a monthly lump sum to cover the operating costs for the implementation of the contract in the country of assignment. The lump sum must include all the costs involved in the proper running of the offices and vehicles.

	Months
Office operating costs	21

5.6 Workshops, education and training

Workshop/ in person training implementation budget: EUR 15,000

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

- Room hire
- Technical systems
- Translation/interpreting services
- Catering
- Workshop materials
- Travel expenses for partner experts (subsistence, accommodation, travel costs)
- Other costs relating to the workshops

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).

5.7 Local contributions

– Not applicable –

5.8 Other costs

5.8a Event Management: EUR 5,000

Covers eligible costs related to the organisation and logistical implementation of project-related events/ trainings.

5.8b Subcontract Restoration: EUR 10,000

Covers eligible costs for small-scale ecological restoration activities and required materials linked to project implementation, including seedlings and planting materials, site preparation, replanting and enrichment planting, and minor rehabilitation measures for pilot or demonstration sites, amongst others.

5.9 Flexible remuneration item

Budget for flexible remuneration: EUR 40,000

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 3.6.5.7 of the General Terms and Conditions.

6. Requirements on the format of the tender

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

The technical-methodological concept of the tender (section 3 of the ToRs) must not exceed 30 pages (not including the cover page, list of abbreviations, table of contents, brief introduction and CV for the backstopper). Additional annexes not requested will not be assessed. External content (e.g. links to websites) will also be disregarded.

The CVs of the staff proposed in accordance with section 4 of the ToRs must be in the EU format and not more than four pages in length. The CVs can also be submitted in English.

The CVs must clearly and unequivocally show what position the proposed person held, which tasks they performed and how long they worked during which period in the specified references.

The references contained in the CVs must therefore include the following information:

- Name of the company/organisation/reference project in which the expert worked
- Position held and task(s) performed by the expert in the company/organisation/reference project
- Work outcomes or products produced by the expert, or expert's contribution to the completion of these outcomes and projects (if relevant)
- Duration of the expert's assignment in the company/organisation/reference project per calendar year **in full-time expert days, weeks or months** (for example: 2019: 2 months, 2020: 10 months, 2021: 1 month)
- Leadership experience/management: clear information on the reference projects or fixed positions within the company/organisation in which the requirements specified in section 4 were fulfilled (for example, period, number of persons for whom the expert had disciplinary responsibility, project budget)
- International professional experience/professional experience in the country of assignment: clear information on the reference projects or fixed positions in the company/organisation in which the requirements specified in section 4 were fulfilled (for example, actual duration of assignment on the ground **in full-time expert days, weeks or months**)

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

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 600,000 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 or an agreement is concluded to provide cofinancing for the measure.

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

-not applicable-

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

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

Scope of possible services:

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

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

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

8. Annexes

- Annex A: MEPA module proposal excerpts
- Annex B: MEPA gender analysis
- Annex C: Recommendations for forest carbon activities