

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

CONFIDENTIAL

**Strategic Advisory for the Green Climate Fund Pipeline
Development and Capacity building**

**Project number/
cost centre:
G-012347-012**

**Tender number
10029851**

1.	List of Abbreviations	2
1.	General Information	3
1.1	Background Information on the Project.....	3
1.2	Nile River Basin Investment Program (NRBIP).....	3
2.	Tasks to be Performed by the Contractor	5
3.	Concept	6
4.	Personnel Concept	7
	Expert.....	7
5.	Costing Requirements	8
	Assignment of personnel and travel expenses	8
	Aspect of sustainability for travel	8
	Specification of inputs	9
6.	Inputs of GIZ and Partners	9
7.	Requirements on the Format of the Tender	10
8.	Optional Services	10
	Quantitative requirements for the optional services	11
	Quantitative requirements for the optional services	12

1. List of Abbreviations

AG	Commissioning party
AIP	Africa Investment Programme
AMCOW	African Ministers' Council on Water
ANBO	African Network of Basin Organizations
AN	Contractor
AVB	General Terms and Conditions of Contract for supplying services and work
AWV63&P	Africa Water Vision 2063 and Policy
AU	African Union
AUC	African Union Commission
BMZ	German Federal Ministry for Economic Cooperation and Development
BO	Basin Organization
FK	Expert
FKT	Expert days
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH
KZFK	Short-term expert
REC	Regional Economic Community
SDG	Sustainable Development Goal
ToRs	Terms of reference
NRBIP	Nile Basin Investment Program

1. General Information

1.1 Background Information on the Project

The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH is a global service provider in the field of international cooperation for sustainable development dedicated to shaping a future worth living around the world. As a public-benefit federal enterprise, GIZ supports the German Government – in particular the Federal Ministry for Economic Cooperation and Development (BMZ) – and many public and private sector clients in achieving their objectives in international cooperation in around 120 countries.

The Multi-Donor Action “Blue Africa” is jointly co-financed by the German Federal Ministry for Economic Cooperation and Development (BMZ) and the European Union and implemented by the GIZ project “Global Water Security for Resilient Development”. The Action is part of the overall EU Action Blue Africa, implemented by the African Union Commission (AUC), the African Ministers’ Council on Water (AMCOW), and the GIZ. Blue Africa is part of and contributes to the Team Europe Initiative on Transboundary Water Management in Africa.

The Specific Objectives of the Action are:

- 1) Strengthen the African continental water governance architecture on transboundary water cooperation;
- 2) Stimulate investments in the African water agenda and improve financing for water priorities and transboundary investments, including in climate adaptation, natural resources management and nature-based solutions; and
- 3) Develop further African benchmarking and monitoring tools on water security.

Under this Action, GIZ works closely with Africa’s key continental water architecture actors, including the AUC, the African Ministers’ Council on Water (AMCOW), the African Network of Basin Organizations (ANBO), Basin Organizations (BOs), Regional Economic Communities (RECs), and Member States. Blue Africa and the Africa Water Investment Programme (AIP) of the African Union seek to narrow the water investment gap and contribute towards Sustainable Development Goal (SDG) 6 targets on water and sanitation by addressing systemic challenges in the preparation and delivery of water investments.

1.2 Nile River Basin Investment Program (NRBIP)

The overall objective of the Nile River Basin Investment Program (NRBIP) is to advance cooperative development of the Nile Basin. Specifically, to advance regional water, food, and energy security by ensuring reliable provision of quality water, boosting agricultural productivity and trade, expanding hydropower and renewable energy, protecting ecosystems and watersheds, and strengthening community resilience to climate change and water-related disasters. The NRBIP supports investments in four thematic areas:

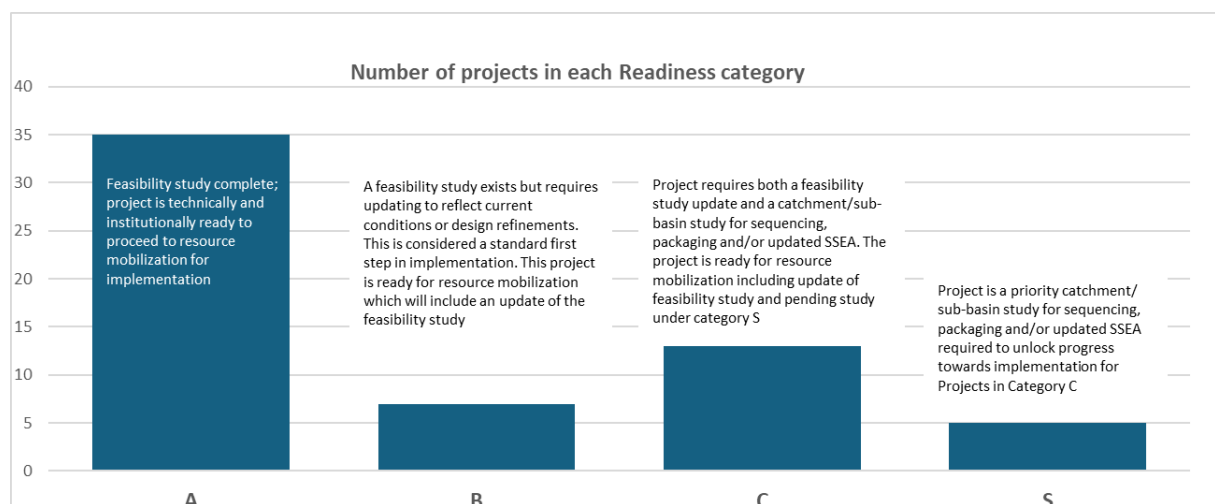
- (i) Water security and climate resilient water resource management and development
- (ii) Energy security: regional power trade; hydropower generation, other renewable energy sources
- (iii) Food security and Agricultural Water Management, and Trade and
- (iv) Environmental sustainability and integrated catchment management

Climate adaptation/mitigation and transboundary cooperation are integrated quality characteristics of the portfolio.

The NRBIP was jointly developed by the RECs and L-RBOs that have a mandate within the Nile Basin and its 10 riparian states (Uganda, Kenya, Tanzania, Rwanda, Burundi, Democratic Republic of the Congo, South Sudan, Sudan, Ethiopia, Egypt). These are: COMESA/East Africa Power Pool, EAC/Lake Victoria Basin Commission, Intergovernmental Authority on Development (IGAD), NBI with its Eastern Nile Subsidiary Action Program (ENSAP) and Nile Equatorial Lakes Subsidiary Action Program (NELSAP) and the Nile Basin Initiative Secretariat, which is the coordinating body in the process. AUDA is also an active strategic partner.

The NRBIP is focused on promoting resource mobilization for investment projects that (a) have passed feasibility stage and (b) have undergone screening and strategic integrated assessment at program level regarding their alignment to the Basin cooperation agenda. The projects remain in the ownership of the participating implementing agencies.

After undergoing the screening and integrated assessments, 60 projects currently form the NRBIP portfolio in the investment areas of water supply and sanitation, hydropower generation, power transmission lines, watershed management, and multipurpose water resources development. The portfolio has projects that could attract various funding categories such as public financing, private sector financing, climate financing, blended financing, etc. Whilst all projects in principle have available feasibility studies, the NRBIP portfolio is still composed of projects that are at different readiness levels, with some projects requiring more consultation and preparatory studies.



The BIP is documented in four key documents:

- BIP Program Document, that set out the governance, objectives and approach
- BIP Portfolio Document, that sets out the current projects within the portfolio
- BIP Integrated Assessment Methodology Document,
- Status of cooperative Investments in the Nile Basin 2000 -2025, which summarizes 25 years of cooperative investments in the Nile Basin and can be considered a proof of concept for scaling up.

The BIP has undergone extensive consultations among countries and agencies and has been approved in principle by the 33rd Nile Council of Ministers, with some clarifications on specific projects still pending. The BIP is scheduled to be launched at the planned 2nd Nile Basin Heads of State Summit, having been developed as a response to the outcomes of the 1st Heads of State and Government Summit.

Against this background, the GIZ Blue Africa Action seeks to engage a **Senior Financial and Business Development Expert** to support the partners of the NRBIP in screening the BIP Portfolio with specific focus on GCF requirements and procedures to assess their readiness.

2. Tasks to be Performed by the Contractor

The contractor is responsible for providing the following services:

Task 1: Screening of the NRBIP portfolio for GCF and development of roadmaps for selected projects

The NRBIP is focused on promoting resource mobilization for investment projects that (a) have passed the feasibility stage and (b) have undergone screening and strategic integrated assessment at the program level regarding their alignment with the Basin cooperation agenda. Under this task, the Expert will work closely with the NRBIP Task Team to screen projects from the portfolio most suitable for GCF and to prepare costed roadmaps and pitches for each project.

The Expert is expected to support the NRBIP task team in screening the projects for GCF financing. This will include the following steps;

- **Step one:** Develop an NRBIP GCF standard screening tool/criteria based on the key criteria for screening projects for GCF through working sessions with the NRBIP task team
- **Step two:** Together with the NRBIP task team, apply the criteria to NRBIP portfolio projects to select the most suitable candidate projects in a workshop.
- **Step three:** Analyze existing documentation and information, such as feasibility studies, climate cases, stakeholder engagement plans, etc., on the selected projects, fit for GCF to identify key gaps
- **Step four:** Together with the NRBIP core team, develop costed specific roadmaps for each of the projects.
- **Step five:** Develop project pitches for each of the projects

Deliverable: up to 5 costed roadmaps and project pitches (Level of Effort up to 10 days)

Task 2: Regional Capacity Development and Technical Training on GCF Readiness

The Expert will support Blue Africa's regional capacity development efforts in climate-resilient water investment planning and climate finance. This includes technical support to the preparation and delivery of up to regional training courses for African countries and regional stakeholders.

The Expert is expected to contribute to training design, technical content development, facilitation, and practical exercises, with a focus on water investment planning and on the GCF project pipeline.

Deliverables: Technical support to up to two regional trainings on access to GCF Financing (Level of Effort 10 days)

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
Inception and work planning	Two weeks after the start of the contract
Screening of the NRBIP Portfolio for GCF Financing	September 2026
Development of costed roadmaps for selected projects	October 2026
Up to 2 regional trainings on the GCF Project Preparation	March 2027

Period of assignment: from Beginning of August 2026 until 31.10.2027.

3. Concept

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

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

Technical-methodological concept

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

The tenderer is required to present the actors relevant for the services for which it is responsible and describe the **cooperation (1.2)** this includes presentation and interaction of the different actors (1.2.1) and strategy for establishing cooperation with relevant actors (1.2.2)

The tenderer is required to present and explain its approach to **steering (1.3)** the measures with the project partners (1.3.1) and its contribution to the **results-based monitoring system** (1.3.2)

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

4. Personnel Concept

The tenderer is required to propose personnel for the positions specified here, with their areas of responsibility and qualifications described based on relevant CVs.

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

Expert

Tasks of the expert

- Overall responsibility for the tasks (quality and deadlines)
- Coordinating and ensuring communication with GIZ, partners, and others involved in the project
- Regular reporting in accordance with deadlines
- Support high-level engagement on the assignment

Qualifications of the expert

- Education/training (2.2.1): university degree - PhD in any of the following fields: finance, environmental policy, water sciences (with a strong financial and policy focus in the African water and sanitation sector).
- Language (2.2.2): C1-level language proficiency in English.
- General professional experience (2.2.3):
 - 15 years of professional experience in water resources management and the environmental finance sector. Technical expertise in public investment in the African water and sanitation sector is required to align water project pipelines with broader economic development agendas (5/10 points)
 - experience in developing climate resilience finance strategies (5 examples, 3/10 points).
 - 10 years of experience in cooperation with continental, regional and national organizations in the African water sector and a good understanding of the broader financing perspective (2/10 points).
- Specific professional experience (2.2.4): 10 years of experience in structuring impact and blended finance instruments tailored to the African context. The expert must demonstrate experience of writing fundable GCF projects or delivering GCF Trainings- up to five examples should be provided in the context of Africa.
- Leadership/management experience (2.2.5): 5 years of management/leadership experience as a project team leader or manager in a company.
- Regional experience (2.2.6): 10 years of experience of working on projects in Africa
- Development Cooperation (DC) experience (2.2.7): 10 years of experience in DC projects.
- Other (2.2.8): 5 examples of high-quality strategic documents, investment frameworks, concept notes (approved by GCF)

Soft skills of the expert

In addition to specialist qualifications, the following qualifications are required of the Consultant:

- 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

Aspect of sustainability 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 higher CO₂ efficiency. For short distances, travel by train (second class) or e-mobility should be the preferred option.

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

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

Specification of inputs

Fee Days	Number of Experts	Number of days per expert	Total	Comments
Financial and Business Development Expert	1	20	20	
Fixed travel budget				<p>A budget has been earmarked for travel (Region: Africa, specific countries to be determined)</p> <p>A fixed budget of EUR 14500 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>
Carbon offsets for flights	1	1		A fixed budget of EUR 1000 is earmarked for settling carbon offsets against evidence.
Other costs			Total	Comments
Flexible remuneration	1	1		A budget of EUR 4500 has been earmarked as a flexible remuneration to be used upon approval by GIZ

6. Inputs of GIZ and Partners

GIZ and partners are expected to make the following available:

- Introduction of the consultant to key stakeholders
- Provide background information needed for the assignment
- Provide logistics for workshops and training
- Provide key documents needed by the consultant to deliver the tasks

7. Requirements on the Format of the Tender

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

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

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 four pages each.** They must clearly show the position and job the proposed person held in the reference project and for how long. The CVs can also be submitted in English.

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

8. Optional Services

After the services put out to tender have been completed, important elements of these tasks can be continued or extended. Specifically:

1. Option 1: Support GCF concept note development for selected project and trainings

Based on the roadmaps developed, high-profile projects will be selected for the preparation of concept notes for GCF funding. The contractor is responsible for providing the following optional services:

- a. Review of documents and previous studies for selected project: The consultant will review the reports as per the list provided by NRBIP partners as a basis to understand the prior relevant work conducted. The consultant will further review the draft project documents (e.g. first draft ideas for Concept Note, Theory of Change, etc.)
- b. Develop draft concept notes following the GCF standard template. Based on the review of key project documents, the consultant will draft a concept note following the GCF guidelines. The consultant should ensure that the proposed approach and activities address the GCF criteria for successful submissions.
- c. Support and participate in stakeholder engagement during concept note development: As part of the concept development process, the consultant is expected to participate and help prepare the concept note during the stakeholder consultative meetings with stakeholders, including government agencies, NGOs, and local communities in the respective countries of the NRBIP partners.
- d. Participate in concept note validation processes and support integration of feedback from stakeholders and GCF for the selected projects
- e. The consultant is expected to participate in validation workshops **Final concepts note:** Based on the feedback from the stakeholder consultation, the consultant will be

expected to finalize the concept note and the relevant annexes with the NRBIP partners for final approvals and submission to GCF.

- f. Undertaking additional regional training on climate resilient financing

Proposed deliverable: A concept note developed for GCF submission and one training delivered (Anticipated Level of Effort: 25 days)

Exercising the option will depend on the deliverables from the main tasks and resource availability. The decision on continuation is expected to be made in the period **January - March 2027**. If the option is exercised, it is anticipated that the contract term will be extended to **October 2027**.

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

Fee days	Number of experts	Number of days per expert	Total	Comments
Financial and Business Development Expert	25	1		Tasks under the optional services are to be elaborated and agreed upon
Travel expenses	Quantity	Number of days per expert	Total	Comments
Carbon offsets for flights	1	1		A fixed budget of EUR 500 is earmarked for settling carbon offsets against evidence.
Fixed travel budget	1	1		<p>A budget is earmarked for travel to the following countries: African countries, exact countries to be determined later.</p> <p>A fixed budget of EUR 8500 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>

2. Option 2: Support GCF concept note development for selected project and trainings

Based on the roadmaps developed, high-profile projects will be selected for the preparation of concept notes for GCF funding. The contractor is responsible for providing the following optional services:

- a) Review of documents and previous studies for selected project: The consultant will review the reports as per the list provided by NRBIP partners as a basis to understand the prior relevant work conducted. The consultant will further review the draft project documents (e.g. first draft ideas for Concept Note, Theory of Change, etc.)
- b) Develop draft concept notes following the GCF standard template. Based on the review of key project documents, the consultant will draft a concept note following the GCF guidelines. The consultant should ensure that the proposed approach and activities address the GCF criteria for successful submissions.
- c) Support and participate in stakeholder engagement during concept note development: As part of the concept development process, the consultant is expected to participate and help prepare the concept note during the stakeholder consultative meetings with stakeholders, including government agencies, NGOs, and local communities in the respective countries of the NRBIP partners.
- d) Participate in concept note validation processes and support integration of feedback from stakeholders and GCF for the selected projects
- e) The consultant is expected to participate in validation workshops **Final concepts note:** Based on the feedback from the stakeholder consultation, the consultant will be expected to finalize the concept note and the relevant annexes with the NRBIP partners for final approvals and submission to GCF.
- f) Undertaking additional regional training on climate resilient financing

Proposed deliverable: A concept note developed for GCF submission and one training delivered (Anticipated Level of Effort: 25 days)

Exercising the option will depend on the deliverables from the main tasks and resource availability. The decision on continuation is expected to be made in the period **August 2027**. If the option is exercised, it is anticipated that the contract term will be extended depending on the project timelines

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

Fee days	Number of experts	Number of days per expert	Total	Comments
Financial and Business Development Expert	25	1		Tasks under the optional services are to be elaborated and agreed upon

Travel expenses	Quantity	Number of days per expert	Total	Comments
Carbon offsets for flights	1	1		A fixed budget of EUR 500 is earmarked for settling carbon offsets against evidence.
Fixed travel budget	1	1		<p>A budget is earmarked for travel to the following countries: African countries, exact countries to be determined later.</p> <p>A fixed budget of EUR 8500 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>