

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

Design, Editing and Translation Services for Energy-related Projects

**Project number/
cost centre:**

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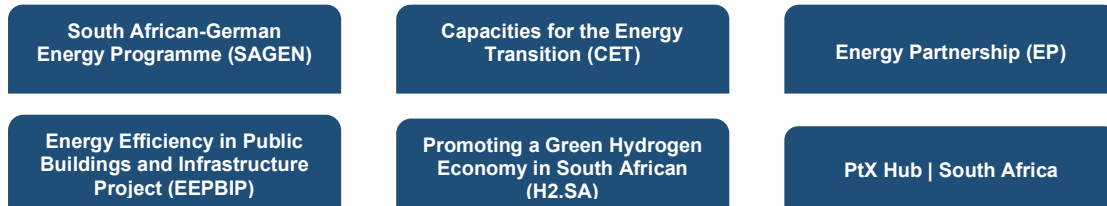
0. List of abbreviations

AN	Contractor
AVB	General Terms and Conditions of Contract for supplying services and work
BMZ	Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung
CET	Capacities for the energy transition
EEPBIP	Energy Efficiency in Public Buildings and Infrastructure Project
EP	Energy Partnership
GIZ	Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
GW	Gigawatt
H ₂	Hydrogen
H2.SA	Promoting a Green Hydrogen Economy in South Africa
IRP	Integrated Resource Plan
JET	Just Energy Transition
KPI	Key Performance Indicator
MW	Megawatt
NERSA	National Energy Regulator of South Africa
RE	Renewable Energy
SAGEN	South African-German Energy Programme
ToRs	Terms of reference

1. Context

The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH is an international cooperation (IC) enterprise for sustainable development with worldwide operations. Its corporate objective is to improve people's living conditions on a sustainable basis. GIZ's work in South Africa is carried out primarily on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ). Some of the core areas of cooperation are climate, energy and just transition.

The Energy Cluster of GIZ South Africa, Lesotho and eSwatini consists of six projects:



1.1 Background of the projects

South Africa is facing far-reaching changes in the power sector. Due to the ageing power plant fleet, old coal-fired power plants with an installed capacity of in total ~11 GW will be decommissioned by 2030, corresponding to more than one fifth of the current power plant capacity. According to the [Integrated Resource Plan \(IRP\)](#) adopted in 2019, the capacities of coal-fired power plants are to be largely replaced by wind and solar power plants (with a capacity increase of around 16 GW and 7 GW respectively). In addition, electricity generation will be further decentralised through the expansion of photovoltaic (PV) roof-mounted systems.

In June 2021, South Africa's president Cyril Ramaphosa announced a planned amendment to *Schedule Two of the Electricity Regulation Act of South Africa*, which will exempt grid-connected generation projects up to 100 MW in size (instead of formerly 1 MW) from licensing requirements of the National Energy Regulator of South Africa (NERSA). This will remove a significant obstacle to investments in embedded generation projects. Overall, electricity generation will move from a currently highly centralised structure with large fossil fuel power plants to more decentralised structures with high shares of renewable energies (RE) as well as flexible power plants based on gas and storage facilities.

At the same time, developments at the global level are of particular relevance for South Africa, specifically the emergence of a green hydrogen (H₂) economy, especially in Europe and other regions of the world that are already more advanced in their energy transition. The abundance of renewable energy resources that could be used to produce green H₂ through electrolysis elevates South Africa to the status of a potential energy superpower of the future. Against the backdrop of a rapidly decreasing global carbon budget and urgency to identify adequate solutions for decarbonizing the so-called hard-to-abate sectors, the demand for green H₂ and H₂-based products, such as ammonia and synthetic jet fuels, is steadily increasing. The renewed discussion on H₂, Power-to-X (PtX) and their production in the partner countries of IC has clearly gained momentum during in the course of decarbonisation and defossilisation efforts. An essential pre-condition for a green H₂ economy would be the massive development of low-cost RE capacities and to this end, existing market barriers would need to be removed, the political and regulatory framework would need to be adjusted and far-reaching capacity building, skills development and training initiative implemented.

1.2 Background of the tender

In the dynamic and evolving landscape of renewable energies, effective communication products play a pivotal role in facilitating progress and success within the sector. The importance of communication products cannot be overstated, as they serve as the connective tissue that binds together various stakeholders, from government agencies and industry players to investors and the general public.

First and foremost, communication products are essential in disseminating critical information and updates pertaining to renewable energy projects and initiatives. Timely and accurate communication helps in building awareness and understanding among stakeholders, fostering support, and ensuring informed decision-making. This is especially crucial in the renewable energy space, where projects often involve significant investments and long-term commitments.

Moreover, in the context of renewable energy, public perception and engagement are paramount. Effective communication products can shape the narrative around renewable energy projects, addressing concerns, dispelling misconceptions, and garnering public support. This not only aids in securing the necessary approvals and licenses but also contributes to the overall social acceptance of renewable energy solutions, which are integral to the transition to a sustainable energy future.

Against this backdrop, communication products are the linchpin of success in the renewable energy space, facilitating the flow of information, garnering public support, and promoting industry growth. They are indispensable tools for navigating the complexities of renewable energy projects, ensuring transparency, and ultimately, driving the transition to cleaner, more sustainable energy sources.

1.3 Purpose of the assignment

The objective of this consultancy is to provide design/layout and editing services to all projects within the Energy Cluster of GIZ South Africa, Lesotho and eSwatini. All energy projects within the cluster (currently six) commission research reports, studies or guidelines, which are completed by consultants, as well as other products such as brochures, fact sheets, presentations and reports.

These documents and communication products require layout, design and editing services to ensure that they are professionally designed, attractively presented, and comply with German Development Cooperation design regulation (→ [Corpoare Design Center](#)). Each project may have their own project branding that needs to be taken into account.

Many reports are summarised into fact sheets and are launched at events which may require a coherent design strategy (invitation, banner, report layout, etc).

Since it is difficult to state the exact number of publications up front, the type of publications for which design and editing services may be required are outlined below:

- Reports of varying lengths (up to 150 pages)
- Fact sheets, brochures, booklets (1-30 pages)
- PowerPoint presentations (Up to 20 slides)
- Pull-up banners, backdrops and other display material
- Event invitations (incl. templates)
- Infographics

2. Tasks to be performed by the contractor

The contractor is responsible for providing the following services:

Graphic Design and Visual Content:

- Design visually appealing infographics, charts, and images to accompany written content.
- Create and edit multimedia content, such as videos and animations, to effectively convey key messages.
- Maintain a consistent visual identity across all communication products.

Layout and Publication Design:

- Design and layout reports, brochures, and other printed or digital materials for both internal and external audiences.
- Prepare documents for publication, considering factors like typography, imagery, and readability.
- Ensure compliance with branding guidelines and quality standards.

Data Visualization:

- Create compelling data visualizations and dashboards to convey project progress and outcomes.
- Generate regular reports summarizing communication efforts, engagement metrics, and audience feedback.
- Provide insights and recommendations for optimizing communication strategies.

Stakeholder Engagement Materials:

- Prepare materials for stakeholder meetings, presentations, and workshops, including slide decks, handouts, and multimedia content.

- Collaborate with project teams to ensure alignment with stakeholder engagement strategies.

Compliance and Quality Assurance:

- Ensure all communication products adhere to relevant regulatory and ethical standards.
- Conduct quality assurance checks to guarantee accuracy, consistency, and compliance with brand guidelines.

Content Creation and Editing:

- Develop and edit written content for various communication materials, including reports, articles, press releases, and website content
- Ensure content aligns with the project's objectives and messaging strategy
- Proofread and edit content for accuracy, clarity, and consistency

Translation Services:

- Translate content for various communication materials and campaigns into a selection of languages to be determined on a case by case basis.
- Languages may include German and any of the official languages of the Republic of South Africa, Lesotho, eSwatini, and the official languages of the African Union.¹

Ad Hoc Tasks: Undertake any additional communication-related tasks as directed by the project manager or team leads.

¹ Sub-contracting of translators is possible.

Modus operandi: The following procedure is to be followed when documents are submitted.

For design services

1. The team member submitting the material will inform the contractor via email about their needs and discusses the product in a virtual call if necessary. The GIZ staff will provide clarity on the purpose of the material, intended audience and type of design required.
2. The service provider should state the timelines of producing materials clearly.
3. For design works (e.g. infographics, covers, banners etc.), the service provider should submit at least three different design options for selection and allows for at least 3 iterations of the material before a final design selection is made.
4. The draft product is submitted for final approval before its completion.
5. The final product is produced and an electronic copy as well as print ready files are submitted (if applicable). The original files should be submitted as requested (e.g. in word, pdf, ai, indd, etc.)

For editing services:

1. The team member submitting the material will inform the contractor via email about their needs and discusses the product in a virtual call if necessary. The GIZ staff will provide clarity on the purpose of the material, the intended audience and the type of design required.
2. The service provider should present the edited document with track changes.
3. GIZ staff may query suggested edits and may request a discussion with the service provider to clarify.

For translation services:

1. Service provider will have to verify that any subcontracted individual(s) executing translation services are duly qualified.
2. Timeline for conducting the translation services should be submitted in advance.
3. Upon completion of translation exercises, confirmation will be required to prove that all translated materials have been edited and proofread.

→ In general, emails and requests should be answered and attended to within 48 hours.

Certain milestones, as laid out in the table below, are to be achieved by certain dates during the contract term, and at particular locations:

Milestone	Deadline/place/person responsible
Inception meeting held	Two weeks after contract start
Progress report, including an overview of all developed products, submitted	By August 2024
Final report, including an overview of all developed products, submitted	By 29 August 2025

Period of assignment: from 22.04.2024 until 30.09.2025.

3. Concept

In the tender, the tenderer is required to show *how* the objectives defined in Chapter 0 (Tasks to be performed) are to be achieved, if applicable under consideration of further method-related requirements (technical-methodological concept). In addition, the tenderer must describe the project management system for service provision.

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

Technical-methodological concept

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 is required to present the actors relevant for the services for which it is responsible and describe the **cooperation (1.2)** with them.

The tenderer is required to describe the key **processes** for the services for which it is responsible and create a schedule (1.4.1) that describes how the services according to Chapter 0 (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).

Project management of the contractor (1.6)

The tenderer is required to explain its approach for coordination with the GIZ project. In particular, the project management requirements specified in Chapter 2 (Tasks to be performed by the contractor) must be explained in detail.

The tenderer is required to draw up a **personnel assignment plan** with explanatory notes that lists all the experts proposed in the tender; the plan includes information on assignment dates (duration and expert months) and locations of the individual members of the team complete with the allocation of work steps as set out in the schedule.

The tenderer is required to describe its backstopping concept. The following services are part of the standard backstopping package, which (like ancillary personnel costs) must be factored into the fee schedules of the staff listed in the tender in accordance with Section 3.3.1 of the GIZ AVB:

- Service-delivery control
- Managing adaptations to changing conditions
- Ensuring the flow of information between the tenderer and GIZ
- Assuming personnel responsibility for the contractor's experts
- Process-oriented steering for implementation of the commission
- Securing the administrative conclusion of the project

Further requirements (1.7)

In addition to the technical concept, the bidder is required to submit a **business profile** that details the bidder's experience in the communication sector, **a portfolio with designs, writing samples** and contactable references of previous or existing clients.

The bidder should also provide an outline of a load shedding mitigation plan to assure GIZ that agreed deadlines will be met despite the occurrence of load shedding.

4. Personnel concept

The tenderer is required to provide personnel who are suited to filling the positions described, on the basis of their CVs (see Chapter 0), the range of tasks involved and the required qualifications.

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

Team leader

Tasks of the team leader

- Overall responsibility for the advisory packages of the contractor (quality and deadlines)
- Coordinating and ensuring communication with GIZ, partners and others involved in the project
- Personnel management, identifying the need for short-term assignments within the available budget, as well as planning and steering assignments and supporting local and international short-term experts
- Regular reporting in accordance with deadlines
- Creative input and support to the design process
- Design, layout and editing services

Qualifications of the team leader

- Education/training (2.1.1): University qualification (Master's degree) in public relations, communication, graphic design or similar
- Language (2.1.2): Good business language skills in English (C1)
- General professional experience (2.1.3): 10 years of professional experience in the public relations and communication sector
- Specific professional experience (2.1.4): 5 years in publication design
- Leadership/management experience (2.1.5): 5 years of management/leadership experience as project team leader or manager in a company
- Regional experience (2.1.6): 5 years of experience in projects in Africa (region), of which 3 years in projects in South Africa (country)
- Development Cooperation (DC) experience (2.1.7): Not applicable
- Other (2.1.8): Not applicable

Short-term expert pool with minimum 2, maximum 2 members

For the technical assessment, an average of the qualifications of all specified members of the expert pool is calculated. Please send a CV for each pool member (see below Chapter 7 Requirements on the format of the bid) for the assessment.

Tasks of the short-term expert pool

- Provision of layout and design services
- Provision of editing and proof-reading services

Qualifications of the short-term expert pool

- Education/training (2.6.1): 1 expert with university qualification (diploma) in graphic design/layout design, 1 expert with university qualification (diploma) in linguistics or communication.
- Language (2.6.2): 2 experts with very good language skills in English (C2)
- General professional experience (2.6.3): 1 expert with 5 years of experience in graphic design, 1 expert with 5 years of experience in editing
- Specific professional experience (2.6.4): 1 expert with 3 years of experience in publication design and layout, 1 expert with 3 years of experience in copyediting and proofreading
- Regional experience (2.6.5): 2 experts with 5 years of experience in South Africa
- Development Cooperation (DC) experience (2.6.6): Not applicable
- Other (2.6.7): Not applicable

Soft skills of pool members

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

- Team skills
- Initiative
- Communication skills
- Sociocultural competence
- Efficient, partner- and client-focused working methods
- Interdisciplinary thinking

The tenderer must provide a clear overview of all proposed short-term experts and their individual qualifications.

5. Costing requirements

Assignment of personnel

Team leader: On-site assignment (South Africa) for **50 expert days**

Short-term expert pool (designer and editor): Assignment in country of assignment South Africa for **276 expert days**

Sustainability aspects for travel

GIZ would like to reduce greenhouse gas emissions (CO₂ emissions) caused by travel. When preparing your tender, please incorporate options for reducing emissions, such as selecting

the lowest-emission booking class (economy) and using means of transport, airlines and flight routes with a higher CO₂ efficiency. For short distances, travel by train (second class) or e-mobility should be the preferred option.

If they cannot be avoided, CO₂ emissions caused by air travel should 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
Designation of TL	1	50	50	
Designation of short-term expert pool	2	138	276	
Other costs	Number	Price	Total	Comments
Flexible remuneration	A budget of ZAR 171,400.00 is foreseen for flexible remuneration. Please incorporate this budget into the price schedule. Use of the flexible remuneration item requires prior written approval from GIZ and is only available for activities as outlined in the ToR.			
Subcontracts For Translation Services (to be set up upon request and language).	In accordance with these ToR, a fixed sum of ZAR 8,000.00 has been allocated for each subcontract (max. 3), reflecting the agreed compensation for translation services provided.			

Workshops and training

Not applicable

6. Inputs of GIZ or other actors

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

- GIZ will make its corporate design manual available

7. Requirements on the format of the tender

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

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

The CVs of the personnel proposed in accordance with Chapter 0 of the ToRs must be submitted using the format specified in the terms and conditions for application. The CVs shall not exceed 4 pages each. They must clearly show the position and job the proposed person held in the reference project and for how long. The CVs must be submitted in English and in tabular form.

Please calculate your price bid based exactly on the aforementioned costing requirements. In the contract the contractor has no claim to fully exhaust the days/travel/workshops/ budgets. The number of days/travel/workshops and the budget amount shall be agreed in the contract as 'up to' amounts. The specifications for pricing are defined in the price schedule.

8. Option

Not applicable

9. Annexes

Not applicable