

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

CONFIDENTIAL

<u>To Provide Group Dynamics Training, Basic Micro Business Management Skills, Village Savings and Loans, Social Protection Promotion as well as Occupational Health and Safety Training for selected beneficiaries under the Sunlce Project with FanMilk PLC.</u>	Project number/ cost centre: G-011454-007
	Tender number

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0. List of abbreviations

AG	Commissioning party
AN	Contractor
AVB	General Terms and Conditions of Contract for supplying services and work.
FK	Expert
FKT	Expert days
KZFK	Short-term expert
ToRs	Terms of reference

1. Context

Due to the constant growth of Africa's population, the continent needs 20 million new jobs annually. This goal is only achievable in cooperation with the private sector. In order to realize employment-related investments with companies, the Special Initiative "Decent Work for a Just Transition" (Invest for Jobs), commissioned by the German Federal Ministry for Economic Cooperation and Development (BMZ), works with African countries that are committed to reforms; and supports them to create more and better jobs and therefore providing future prospects for the local population.

The Special Initiative in Ghana works in three components: 'Business & Invest', 'Cluster Approach' and 'Ghanaian SME (Mittelstand)'. Under the 'Business & Invest', the programme promotes sustainable investments from German and European companies and investors; the 'Cluster approach' aims to increase the economic attractiveness of business locations and industries; support industrial parks, improve export opportunities and address various obstacles to investment.

Under its Component 1, Business and Invest, GIZ is collaborating with public and private partners to implement the **Sustainable Green Energy for Micro- Dairy Enterprises**, also referred to as the **SunIce Project**.

The SUNICE project, in its design speaks directly to the core objectives of the Invest for Jobs project, to address investment barriers for the private sector to create an environment that is conducive for job creation. It also seeks to address issues with Just transition by seeking to employ solar energy and the use of e-bikes as opposed to the traditional methods currently being used by their mini – distribution network who currently employ the use of a manual driven bicycle and a dependence on the national grid for power to keep the products at the optimal temperature. The project also creates an avenue for Gender Equality approach by seeking to employ women at the main distribution centres and employ some PWDs as well.

The overall project objective is to improve the employment situation and working conditions of 1000 people (at least 50% youth, 40% females) through the promotion, development and provision of micro-entrepreneurship opportunities to the people of Ghana as a means of sustainable employment-promoting growth whiles building economic resilience in the Greater Accra Region of Ghana.

2. Tasks to be performed by the contractor

With this assignment, GIZ and partners seek to prepare and strengthen micro-enterprises, aimed at securing the local market of FanMilk PLC and expanding into other communities.

Therefore, GIZ-Ghana seeks to engage a consultancy firm with the required professional knowledge and experience.

A. Objective of Consultancy Assignment

The objective is to:

1. Review/adapt/Develop manuals and curriculum on general business models, marketing models, basic principles of business management from relevant organizations to the context of the project for the identified groups.
2. Sensitize 1000 beneficiaries and support them to co-create vibrant cooperative associations with efficient and effective leadership and governance structures.
3. Introduce, train and guide beneficiaries on the formation and running of a village savings and loans association scheme.
4. Promote and introduce beneficiaries to social protection measures, including health insurance and pension schemes.
5. Co- create an occupational health and safety module for the beneficiaries of the project and translate into local languages for easy assimilation as the need may arise.

1. Group Dynamics Training

The consultant shall provide the following output as evidence of work undertaken both in hard and soft copies:

- An inception report
 - Report on group dynamics activities including the training of members and executives of Cooperatives/ Association or any form of group with similar inclinations.
 - Member support/benefit circle
 - Word version of training guidelines/materials used for training.
 - Group communication plan developed.
 - Group code of conduct/norms developed.
2. Sensitize 1000 beneficiaries and support them to co-create vibrant cooperative associations with efficient and effective leadership and governance structures.

The consultant is expected to develop a strategy to co-create with the beneficiaries a structure to formalize a cooperative association that suits their specific needs. This should culminate into a corporate governance strategy that results in the election of executives and a sustainability and continuity plan for the association. Provide the necessary support to formalize the associations and register them with the requisite state agencies (Department of Cooperatives).

3. Introduce, train and guide beneficiaries on the formation and running of a village savings and loans association scheme or any similar in structure and purpose of same.
 - Group the beneficiaries into VSLA groups or any one similar to that, as shall be agreed in a co-creative session.
 - Provide guidance for the formation, regularization, registration and developing of by-laws for the governance of the VSLA groups.
 - Design, develop or adopt a platform that meets the needs of VSLAs, including:
 - Member registration and management
 - Savings and loan management
 - Transaction recording and reporting
 - Financial Statement Generation
 - Develop a comprehensive training program for VSLA members, leaders, and trainers on the use of the digital platform.
4. Promote and introduce beneficiaries to social protection measures, including health insurance and pension schemes.
5. Co- create an occupational health and safety module for the beneficiaries of the project and translate into local languages for easy assimilation as the need may arise.
6. Work together with all parties involved to design the branding materials for 1000 beneficiaries. (hats, reflective vests, helmets, etc)

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

Milestone	Deadline/place/person responsible
Brief Inception meeting	02.07.2026, Accra
Present detailed time schedule(s) for the implementation of the trainings	15.07.2026, Accra
Undertake main activities of the consultancy	26.07.2026 – 30.01.2027, project locations
Submit Progress Reports	30.01.2027, Accra
Submit Final report including participants lists, monitoring tables, group and individual pictures as well as consent forms	12.04.2027, Accra

Duration of Assignment	02.07.2026 – 30.04.2027
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Geographic coverage	Greater Accra Region
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3. Concept

In the bid, the bidder is required to show how the objectives defined in Chapter **Error! Reference source not found.** are to be achieved, if applicable under consideration of further specific method-related requirements (technical-methodological concept). In addition, the bidder must describe the project management system for service provision.

Technical-methodological concept

Strategy: The bidder is required to consider the tasks to be performed with reference to the objectives of the services put out to tender (see Chapter **Error! Reference source not found.**). Following this, the bidder presents and justifies the strategy with which it intends to provide the services for which it is responsible (see Chapter **Error! Reference source not found.**).

The bidder is required to present the actors relevant for the services for which it is responsible and describe the **cooperation** with them.

The bidder is required to present and explain its approach to **steering** the measures with the project partners and its contribution to the results-based monitoring system.

The bidder is required to describe the key **processes** for the services for which it is responsible and create a schedule that describes how the services according to Chapter **Error! Reference source not found.** are to be provided. In particular, the bidder is required to describe the necessary work steps and, if applicable, take account of the milestones and contributions of other actors in accordance with Chapter **Error! Reference source not found.**

The bidder is required to describe its contribution to knowledge management for the partner and GIZ and promote scaling-up effects (**learning and innovation**).

The bidder shall clearly indicate:

- 1) Geographic area, where training will take place / where contractor is located.
- 2) Trade area(s)
- 3) Number of trainers available
- 4) Preliminary indication when the training is supposed to happen (morning/midday/evening and number of training days per week/month).

Project management of the contractor

The bidder is required to explain its approach for coordination with the GIZ project.

- The contractor is responsible for selecting, preparing, training and steering the experts assigned to perform training.
- The contractor makes available equipment and supplies (consumables) and assumes the associated operating and administrative costs.

- The contractor manages costs and expenditures, accounting processes and invoicing in line with the requirements of GIZ.
The contractor reports regularly to GIZ in accordance with the AVB of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH.

In addition to the reports required by GIZ in accordance with AVB, the contractor submits the following reports/outputs as evidence of work:

- Detailed time schedule(s) for the implementation of the tasks i. e. timeline required.
- Participants Lists of the trainees (validated via signatures/thumbprints): Monitoring / data selection and storage must adhere to the Data Protection Policy and discussed with GIZ.
- Monthly progress reports/updates within the training period, in close collaboration with GIZ and project partners
- Group and individual pictures of the workshops / beneficiaries with signed consent forms by each person for which data or pictures are taken. A template will be provided by GIZ.
- Final training report

Beyond the aspects mentioned above, the technical proposal shall include:

- Institutional profile
- Registration certificate
- Understanding of assignment, proposed methodology and work plan to approach the assignment.
- Details must include among others.
 - Duration of training per person/group
 - Training plan / content incorporating all stated modules.
 - Capacity to offer training (trainers, list of tools and equipment)
 - Modalities to ensure job/order matching of at least 50% of trained beneficiaries.
- In case the contractor has capacities to train more than the assigned persons, this should be indicated (although the financial proposal shall be based on assigned number)

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

4. Personnel concept

The bidder is required to provide personnel/trainers who are suited to filling the positions described, on the basis of their CVs (see Chapter 6), the range of tasks involved and the required qualifications.

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

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, in particular 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

Qualifications of the team leader

- Education/training (2.1.1): (Master's) degree in Business Administration, Social Science, Marketing, Development management or related fields.
- Language (2.1.2): Good business language skills in report writing and communication skills in English and good knowledge of local languages (Twi, Fante, Bono etc.)
- General professional experience (2.1.3): At least 12 years' experience in community work and enterprise development or any group activities.

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Key experts (4)

Tasks of institutional staff / trainers

- Delivery of training as described above.

Qualifications of institutional staff / trainers

- Education/training (2.2.1): At least bachelor's degree in business administration, Marketing, community development or related fields
- Language (2.2.2): Good skills in English and good knowledge of local languages (Twi, Fante, Ga, Bono etc.)
- General professional experience (2.2.3): At least 6 years of post-graduate professional experience in Business Administration, Marketing, Occupational Health and Safety, Enterprise/community development or related fields, SME development

Soft skills of team 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

5. Costing requirements Assignment of personnel and travel expenses

Team leader as well as trainers / institutional staff (approximately 5 in total) for expert months

Assignment of personnel

Assignment of personnel and travel expenses

Accommodation costs which exceed this up to a reasonable amount and the cost of flights and other main forms of transport can be reimbursed against evidence.

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

Sustainability aspects for travel

GIZ 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	60	60	
Designation of key expert	4	50	200	
Travel expenses	Quantity	Number per expert	Total	Comments

Per-diem allowance in country of assignment	1	5	5	
Transport	Quantity	Number per expert	Total	Comments
CO ₂ compensation for air travel				A fixed budget of EUR is earmarked for settling carbon offsets against evidence.
Travel expenses (train, car) Car Rental	1	5	5	Travel within the country and city of assignment for 20 days
Fuel for Car	1	5	5	Fuel for car within the period of transport.
Other costs	Number	Price	Total	Comments
Workshop (Food, Tnt)	600	30	18000	Food and tnt for participants.
Hall Rental	15	90	1350	For trainings

Milestones/partial works	Estimated expert days for orientation	Deadline/place/person responsible
Inception and Document Preparation	10	Consultant
Implementation and Training	30	Consultant
Reporting and Closing	10	Accra/ Consultant

Travel

The bidder is required to calculate the travel by the specified experts and the experts it has proposed based on the places of performance stipulated in Chapter **Error! Reference source not found.** and list the expenses separately by daily allowance, accommodation expenses, flight costs and other travel expenses.

Workshops, training

The contractor implements the following workshops/study trips/training courses:

- Workshops/trainings to 1000 persons over a period of 5 months constitutes the main task of the assignment, as described above.

Other costs

Apart from the professional stated above, the financial proposal shall include all costs required in a detailed breakdown, such as

- Cost and list of any tools and materials/consumables required to aid training.
- Travel costs, if applicable
- Costs for Coordination / Contacting beneficiaries etc.

6. Requirements on the format of the tender

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

The complete bid shall not exceed 10 pages (excluding CVs).

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. The CVs 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 (language).

If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment.

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.

7. Option

After the tasks put out to tender have been completed, important elements of these tasks can be continued or extended within the framework of a follow-on assignment, e.g. in terms of type and scope. The option is exercised in the form of an extension to the contract based on the already offered individual rates.

8. Annexes

not applicable