

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

CONFIDENTIAL

Provide integrated Monitoring, Evaluation, Learning and Knowledge Management support to the implementation of ABioSA Phase III

**Project number/
cost centre:
G-012159-201**
**Tender number
7000016850**

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0. List of abbreviations

ABF	African Biotrade Festival
ABioSA	ABS Compliant Biotrade in South(ern) Africa
ABS	Access and Benefit Sharing
BCI	Buyer Confidence Index
BioPANZA	BioProducts Advancement Network South Africa
BMZ	German Federal Ministry for Economic Cooperation and Development
BSOs	Business Support Organisation
CBD	Convention on Biological Diversity
CCPS	Centre for Cooperation with Private Sector
CoA	Certificate of Acceptability
DAC	Development Assistance Committee
DFFE	Department of Forestry, Fisheries and the Environment
DSTI	Department of Science, Technology and Innovation
GBF	Global Biodiversity Framework
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
GQSP	Global Quality and Standards Programme (UNIDO)
IPLC	Indigenous Peoples and Local Communities
KE	Knowledge Ecology
KM	Knowledge Management
MEL	Monitoring, Evaluation and Learning
MSC	Most Significant Change
MSMEs	Micro, Small and Medium Enterprises
NBES	National Biodiversity Economy Strategy
NEMBA	National Environmental Management: Biodiversity Act
OECD	Organisation for Economic Co-operation and Development
PSC	Project Steering Committee
RBM	Results-Based Management
ROM	Results-Oriented Monitoring
SECO	Swiss State Secretariat for Economic Affairs
SDPs	Sector Development Plans
ToC	Theory of Change
ToRs	Terms of reference
The dtic	The Department of Trade, Industry and Competition
UNCTAD	United Nations Conference on Trade and Development

1. Brief information on the Project

The ABS Compliant Biotrade in South(ern) Africa (ABioSA) phase III is implemented by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) under the Global Project called “Strengthening national implementation of global biodiversity targets”. It is housed in GIZ South Africa under the Centre of Cooperation with Private Sector (CCPS), funded by the Swiss State Secretariat for Economic Affairs (SECO) and is executed in close partnership with the Department of Forestry, Fisheries and the Environment (DFFE).

ABioSA supports the achievement of key government targets as set out in the National Biodiversity Economy Strategy (NBES), including economic growth, transformation and sustainability. Within this context the project also supports the prioritisation of national indigenous species identified for cultivation and sustainable harvesting.

Phase I was implemented from February 2018 and Phase II from November 2021, following a systemic competitiveness approach across the micro, meso, macro and meta levels of the biotrade economy, and works with selected indigenous biological resource value chains in South Africa and the wider southern African region.

Phase III runs from 01 January 2026 to 31 December 2028 and is structured around three outcome areas plus a cross-cutting Insight and Change Management modality (which encompasses Monitoring, Evaluation and Learning (MEL), Knowledge Management (KM), events and peer learning, marketing and communication, and flexible risk management). The three outcome areas are:

Component	Outcome and Phase III scope
Component 1 Micro level: Enterprise support.	Improved MSME compliance with ABS and market requirements in the biotrade sector. Implemented through a programmatic MSME pipeline supported by a diagnostic and referral tool. Targets: 70 MSMEs profiled, 20 mentored/trained, 50 referred to other BSOs.
Component 2 Meso level: Sector coordination.	Improved and strengthened sector-wide coordination and coherent support services. Implemented through grants and technical support to associations and other meso-level organisations, structured around the seven Sector Development Plan (SDP) pillars. Targets: 1 to 3 sector plans, 1 to 3 vertical/horizontal partnerships, 1 to 3 transboundary or landscape-approach plans.
Component 3 Macro level: Enabling environment.	An enabling environment to exchange and cooperate in the biotrade economy. Implemented through a four-tier ABS approach including national resources, inter-departmental forums, regional engagement, and South-to-South peer learning.
Insight & Change Meta level: Cross-cutting.	Encompasses MEL, KM, events and peer learning, marketing and communication, and flexible risk management. The contractor procured under this ToR works within this modality.

This Terms of Reference (ToR) is primarily focused on the Insight and Change Management modality of ABioSA Phase III, with specific emphasis on the integrated implementation of MEL and KM. The assignment supports all three project outcomes and the meta-level Knowledge Ecology that ties them together.

ABioSA is not only striving for direct impacts. The project deliberately contributes to systemic insight and change, recognising that even people and enterprises with no direct project contact may benefit indirectly through changes in regulation, sector coordination, narrative and practice. Phase III MEL and KM must therefore be capable of detecting and reporting both direct and systemic results, including the early signals of change that may not yet be visible in conventional indicators.

2. Background

ABioSA applies a Results-Based Management (RBM) approach. Across the project lifecycle, the team uses an integrated set of management modalities and tools, organised into three categories: (i) Planning and Design Management; (ii) Implementation and Close-out Management; and (iii) Insight and Change Management. The third category is positioned in Phase III as the project's living engine for learning, adaptation and sustainability.

Within Insight and Change Management, five interlinked modalities operate together:

1. Knowledge Management (KM),
2. Monitoring and Evaluation (M&E),
3. Events and Peer Learning,
4. Marketing and Communications,
5. Flexible Risk Management.

The Phase III proposal positions these modalities inside a Knowledge Ecology, a way of working that treats learning, insight generation and change management as a living, adaptive, and relational process across the micro, meso, macro and meta levels of the systemic competitiveness framework.

The rationale for this assignment is therefore twofold. First, the project requires rigorous, results-oriented monitoring and evaluation of implementation against the Phase III logframe, including baseline, mid-term review, close-out and final reporting. Second, the project requires the deliberate capture of evidence, stories, signals, trajectories and sector insights over time, so that learning is not only documented but actively informs decisions and is carried forward by stakeholders themselves. MEL and KM are therefore designed as a single, integrated practice rather than as parallel functions.

This ToR consolidates the Knowledge Ecology approach described in Section 5.3 of the ABioSA Phase III project proposal/plan and in the ABioSA III Knowledge Ecology framework document, which the latter will be shared as attachment with bidders.

The service provider will not be responsible for delivering the remainder of the Insight and Change Management modalities being Events and Peer Learning, Flexible Risk Management, or Marketing and Communications as distinct workstreams. However, integration with these

functions will be central to the success of the assignment. The following coordination expectations apply:

Function	Coordination expectation of the MEL and KM service provider
Events / workshops / peer learning platforms	• Design event evaluation tool(s) and integrate event data into the MEL and KM system. • Where requested by ABioSA, facilitate 1- 3 selected MEL-focused peer learning sessions. • ABioSA and partners will arrange logistics, scheduling and participant management; the service provider focuses on evaluation design, sense-making and synthesis.
Flexible risk management	• Identify and report implementation risks emerging from baseline, annual review, and close-out data, including weak signals from narrative inquiry. • Feed risks memos through the agreed reporting line (Component Manager who will report to the Project Steering Committee/PSC meeting). • Support reflective re-assessment of assumptions during the annual Quo Vadis.
Marketing and communications	• Provide a quarterly insight memo to the Marketing and Communications service provider, summarising emerging stories, lessons, signifiers and sector insights once available. • Coordinate on stories selected for publication, ensuring consent, accuracy and contextual integrity. • Graphic design, editing and communication product development will remain with the Marketing and Communications service provider to be appointed. If printing is required the GIZ project will be responsible for this.

Any emerging lessons, sector insights, stories or knowledge generated through project implementation must be documented within the MEL and KM system, communicated to the ABioSA project team, and made available to the appointed Marketing and Communications service provider according to the agreed quarterly schedule and ad hoc as material insights arise.

3. Context

The Phase III logframe, which serves as the basis for Results-Oriented Monitoring (ROM), is anchored in the Phase III Theory of Change (ToC) building on phase II. The Phase III ToC operates across four levels of the systemic competitiveness framework (micro, meso, macro, meta) and contributes to the long-term impact of creating a resilient, prosperous, competitive, inclusive and sustainable Southern African ABS-compliant biotrade sector. The different elements of the logframe clarify the logical thinking behind the project, showing how inputs will be used to realise activities that lead to outputs, outcomes, and eventually development impact. It is treated as a living document, updated as implementation evolves and as risks, signals and sector dynamics are interpreted through structured reflection points such as the annual Quo Vadis review linked to reporting during the Annual ABioSA Project Steering Committee (PSC) meeting usually taking place in February of each year.

Phase I and II produced a substantial MEL and KM legacy that the Phase III service provider ***must use as the starting point, not as background reading only.*** Annex A (which forms a crucial part of this ToR) provides information regarding the following:

- Phase II Project End Report results against the six OECD/DAC criteria
- Overview of the Phase II instruments and deliverables.
- Alignment frameworks and methodology expectations.
- ABioSA Phase III Indicator Menu.

4. Aim of the assignment

The aim of this assignment is to appoint a service provider (***consultancy firm or consortium***) ***to provide an integrated Monitoring, Evaluation, Learning and Knowledge Management support to the implementation of ABioSA Phase III.***

The service provider will design and implement a result-oriented MEL plan based on the Phase III logframe, within the framework of the Theory of Change, the UNCTAD BioTrade Principals and Criteria, the OECD/DAC evaluation criteria and the ABioSA Knowledge Ecology framework. The service provider will support the project to operationalise the Insight and Change Management modalities across the project life cycle.

The integration of MEL and KM into a single ToR reflects the position articulated in the Phase III proposal and in the Knowledge Ecology framework, namely that MEL operates as a reinforcing scaffold within the Knowledge Ecology and that evidence-based learning, story-collecting, and pattern recognition are interdependent. Procuring MEL and KM separately would create the same coordination cost the framework is designed to lower.

The service provider will support the project to:

- **Build on Phase II instruments, not from scratch.** The contractor is required to adopt, adapt, and where necessary retire the Phase II MEL instruments listed in Annex A, point 2 justifying each decision in the inception report.
- **Strengthen data verification.** The contractor will classify every module and outcome indicator according to verification status (independently verified, partially verified, self-reported) and will design verification protocols that progressively close the partial-verification gap which was identified at Phase II close-out.
- **Operate within the Knowledge Ecology.** The contractor will treat MEL evidence as one of several knowledge flows within the Phase III Knowledge Ecology, linking story collection Most Significant Change (MSC) or SenseMaker signifiers, Buyer Confidence Index (BCI) qualitative feedback, satisfaction survey open-ended responses with indicator data and with company and SDP-level reporting maintained and owned by associations and the MSMEs.
- **Support stewardship, not substitution.** The contractor will support associations contracted by ABioSA to maintain and extend the Factual Findings Report (FFR) system as part of sector-level sustainability and self-agency, recognising that FFRs are owned by associations and not by the project.

- **Contribute to KM continuity beyond the project.** The contractor will produce KM scaffolds (templates, calendars, simple data return formats) that contracted MSMEs, associations and BSOs can continue to operate after the project closes.

The assignment is organised in four phases mirroring the project lifecycle, with KM work integrated across every phase rather than separated into a standalone work package. The phases are:

- **Phase A: Inception, baseline assessment, and instrument design** (approximately the first 3 to 5 months of Phase III)
- **Phase B: Mid-term review** (approximately mid-point of Phase III)
- **Phase C: Close-out evaluation** (approximately final 6 months of the contract)
- **Phase D: Final reporting and KM handover** (end of contract)

Each phase will contain the following steps, adapted to the focus of the phase: kick-off / review meeting with the ABioSA project team and other; desktop review; MEL plan and framework adaptation; interviews, meetings (virtual and in-person) and field visits (where needed); data analysis; report writing; feedback meetings and presentation workshops.

Each phase will additionally contain the following KM activities: review and update of the Knowledge Ecology framework; capture of stories and signifiers from project events; input data for the production of KM artefacts, which the Marketing and Communications service provider will develop in formats suited to different stakeholder groups; integration of MEL evidence with stakeholder narratives.

The below table breaks down the tasks of the assignment, recognising that some of these tasks and activities will run concurrently and therefore reasonable/moderate modifications to the milestone dates can be accommodated.

Milestones/process steps/partial services	Deadline/place
Phase A: Inception, baseline assessment, and instrument design	First 3 – 5 months
Sub-activities	Upon signing of the contract
• Kick-off meeting/workshop with the ABioSA project team, including agreement on field-visit scope, geographic sampling, and stakeholder list etc.	
• Audit of Phase II MEL and KM legacy: review of the Close-Out Report, the Project End Report, the Buyer Confidence Index report, the Stakeholder Satisfaction Survey, the Quo Vadis Summary, the Knowledge Ecology framework, the Phase III Indicator Recommendations and Menu (4 December 2025), and the four association-level SDP Transition Tables. The contractor will document which instruments are carried forward, which are adapted, and which are retired, with explicit reasoning, and will confirm adoption of the Phase III Indicator Menu (Annex A, point 5) including any proposed adjustments.	
• Adaptation of the Phase III logframe to the contractor's MEL design, including refinement of indicators, baseline values, target values, and means of verification. Where the Phase II data already provides usable baseline values (notably for jobs, BCI score, and association IDA scores), these must be recorded as the Phase III starting point rather than re-baselined.	
• Verification-status classification: for every module and the indicator of all three outcome areas, the contractor will classify the data	

source as independently verified, partially verified, or self-reported, and will propose a protocol for moving partially verified and self-reported indicators toward independent verification over the course of the phase. • FFR engagement with contracted SDP implementers. The contractor will document how the FFR data flows into the ABioSA Phase III logframe, what confidentiality protocols apply, and where independent review may be required. • BCI continuity: design of the next round of the Buyer Confidence Index, retaining the seven-dimension structure and the 20-question instrument so that the 2023 to 2025 trend can be continued. The contractor will propose a sampling design that broadens the respondent base while preserving comparability considering the African Biotrade Festival (ABF) 2027 as a key point of data collection. • EU and other end-market data collection on buyer perceptions, market trends, and non-tariff barrier developments, to verify and update the BCI and to support Outcome 1 and Outcome 2 indicators. (Note: in Phase II this was carried out by a short-term international expert. In Phase III this can be delivered through a sub-task within the consortium provided the relevant expertise is included.) • Knowledge Ecology baseline: with reference to the Knowledge Ecology framework, the contractor will map the existing knowledge flows, scaffolds, and platforms in the Phase III project at inception, and identify gaps to be addressed during implementation.	
Deliverables • Inception Report with the proposed MEL/KM design, audit of Phase II legacy, verification-status classification of all the Phase III indicators. • Baseline Assessment Report; with draft baseline values for every module and outcome indicator, and with verification-status classification based on phase II information incl. ◦ BCI baseline confirmation recording the 2025 endline value (81%) as the Phase III starting point and documenting the design of the Phase III BCI rounds. ◦ Knowledge Ecology baseline map documenting existing scaffolds, platforms, and knowledge flows, with proposed Phase III KM development priorities. • Baseline presentation workshop with the ABioSA team, DFFE, SECO, and other partners and stakeholders during the ABioSA Annual PSC meeting in February 2027.	By February 2027
Phase B: Mid-term review	Mid-point of phase III
Sub-activities • Physical or online meeting with the ABioSA component manager and partners to review baseline data and findings against the project outcomes and objectives, and to discuss possible adaptations to project implementation. • Desktop review of project bi-annual and annual progress reports, FFRs from supported associations, and outputs from the BioPANZA MSME pipeline and SDP implementation since baseline.	

• Mid-term survey of MSMEs, associations, BSOs and policy actors using the Close-Out Evaluation Questionnaires (MSME, association, BSO versions) adapted for a mid-term snapshot. • Mid-term BCI round (targeting the ABF 2027 event), targeting an expanded respondent base while preserving the seven-dimension instrument. Trend interpretation must explicitly address comparability with the 2023 and 2025 measurements. • MSC story collection across the MSME pipeline, the SDP implementer cohort, and policy level engagement activities. Stories must be coded and analysed for the four MSC change domains identified in Phase II (awareness, attitudes and self-perception, engagement and networking, collective vision) and any emergent domains. MSC or SenseMaker signifiers are to be used as a recognised verification methodology for indicators dealing with awareness, attitudes, agency, and community participation. • Follow-up discussions with the ABioSA team and partners to validate findings of the information sessions. • Knowledge Ecology mid-cycle review: documentation of what scaffolds and flows are functioning, where adaptation is needed, and what new instruments or platforms are emerging	
Deliverables: • Mid-Term Review Report, including progress-against-target for every module and outcome indicator, verification-status update, and recommendations for the close-out period incl. ◦ Mid-term BCI Report (if a mid-term round is conducted). ◦ MSC interim analysis summarising stories collected to date, coded against the four established change domains and any emergent domains. • Mid-term presentation workshop with the ABioSA team and partners at the ABioSA Annual PSC meeting in February 2028.	By February 2028
Phase C: Close-out evaluation	Final 6 months of the contract
Sub-activities • Physical or online meeting with the ABioSA Component Manager and partners to review mid-term data and findings, and to discuss intended and unintended results of any adaptations made after the mid-term review. • Desktop review of project documents, FFRs (final returns where available), SDP implementation outputs, KP and event records, and bi-annual reports. • Close-out interviews and surveys with the project team, beneficiaries, and stakeholders, including site visits where appropriate. The geographic scope and number of physical visits will be agreed at the kick-off meeting for Phase C. • Phase III endline BCI round, targeting comparability with the 2023, 2025, and any mid-term measurements. • Phase III Stakeholder Satisfaction Survey, modelled on the Phase II survey administered in 2025 (online plus in-person at the ABF 2027). The contractor must achieve a response rate at least as high as Phase II (24%) and ideally higher, with explicit gender disaggregation.	

• MSC final analysis: full coding of the story corpus collected across the project lifecycle, with synthesis against the four established change domains and any emergent domains. • Final IDA scoring for each supported association, tracking institutional development since baseline. • Final SDP Transition Tables completed in collaboration with each supported association. • Knowledge Ecology close-out review: documentation of scaffolds and platforms that will continue after project closure, with handover notes to the relevant associations, BSOs, or government partners.	
Deliverables: • Close-Out Evaluation Report, including endline values for every module and outcome indicator with explicit verification status, and including findings, conclusions, and recommendations. With a summary annex structured around the six OECD/DAC criteria. • Close-out BCI Report with three-point trend analysis (2023, 2025, Phase III endline) and any mid-term measurement. • Stakeholder Satisfaction Survey Report comparing Phase II (2025) and Phase III endline. • MSC Final Synthesis covering stories collected across the Phase III lifecycle. • Final IDA scores and SDP Transition Tables for each supported association. • Knowledge Ecology close-out report documenting what is being left behind and to whom. • Close-out presentation workshop with GIZ, DFFE and SECO during the Mid-term ABioSA PSC meeting in 2028.	By July 2028
Phase D: Final reporting and KM handover	End of the contract
Sub-activities • Verification of module and outcome indicators for the Phase III technical close-out report and the Phase III Project End Report. • Drafting of content for the Phase III technical close-out report and verification support for the Phase III Project End Report against the OECD/DAC criteria. • Final stakeholder-satisfaction survey integration into Phase III reporting. • KM handover: transfer of curated knowledge products, instruments, and scaffolds to identified host organisations (associations, BSOs, government partners) per the Knowledge Ecology close-out report.	
Deliverables: • Content contribution to the ABioSA Phase III technical close-out report incl the OECD/DAC summary. • Data verification memo confirming the final status of every module and outcome indicator. • KM handover register listing what has been transferred to whom, including any conditions and confidentiality protocols.	By September 2028

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| <ul style="list-style-type: none"> Final meeting on the Phase III results with the ABioSA project team. | |
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Period of assignment: from 25 September 2026 to 29 September 2028.

5. Concept

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

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)** with them.

The tenderer is required to present and explain its approach to **steering** 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).

The tenderer is required to describe its contribution to knowledge management for the partner (1.5.1) and GIZ and to promote scaling-up effects (1.5.2) under **learning and innovation**.

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 list all the experts proposed in the tender; 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.

The contractor shall submit the following reports:

Reports shall be structured and submitted according to deliverable requirements of chapter 3 above. Reports and correspondence shall be submitted in English, according to the reporting requirement of the commissioning party (BMZ). All reports will be shared with the South African partners.

6. Personnel concept

The tenderer is required to provide personnel who are suited to filling the positions described, on the basis of their CVs (see Chapter 7), the range of tasks involved and the required qualifications capable of delivering quantitative, qualitative, narrative and ethnographic research, complexity-aware evaluation, systems-change tracking, and structured knowledge curation. The bidder is required to propose an expert-day distribution that is justifiable against the deliverables in section 5 and section 7.1.

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

The possibility of forming a consortium with another consultancy is permissible if not all the experience and skills are in-house.

Team Leader

Tasks of the team leader

- Overall coordination and responsibility of the assignment of the contractor in close cooperation with the ABioSA Component Manager in terms of quality and deadlines.
- Coordinating and ensuring communication with GIZ, partners, and others involved in the project.
- Concept and design of the results-oriented monitoring and evaluation plan, integrated with KM under the Knowledge Ecology framework.
- Personnel management, in particular ensuring the assignment, coordination and steering of short-term enumerators.
- Reporting (technical and financial) in accordance with deadlines
- Quality assuring of reports, interpretation in alignment with the ABioSA MEL guidelines and definitions and presenting the content in accordance with subject matter and deadlines.
- Responsible for the financial planning and use of funds in consultation with the ABioSA Component Manager.
- Responsible for conducting and facilitating multi-stakeholder feedback workshops, Quo Vadis sessions, and presentation workshops.

Qualifications of the team leader

Education/training (section 2.1.1 of the assessment grid):	University degree (Postgraduate) in economics, development studies, business management or a relevant degree.
Language (section 2.1.2 of the assessment grid):	Good business language skills in English (spoken and written – C2 according to CEFR)

General professional experience (section 2.1.3 of the assessment grid):	15 years of professional experience in results-oriented monitoring and evaluation and implementation of large-scale surveys.
Specific professional experience (section 2.1.4 of the assessment grid):	8 years' experience in theory of change application, OECD/DAC evaluation criteria, UNCTAD BioTrade Principles and Criteria, and at least one of the following methodologies: MSC, SenseMaker, the Knowledge Ecology approach, or institutional development assessment.
Leadership/management experience (section 2.1.5 of the assessment grid):	10 years of management/leadership experience as project team leader or manager in a company.
Regional experience (section 2.1.6 of the assessment grid):	8 years of experience in projects in Southern Africa, of which 5 years in projects in South Africa.
Development cooperation (DC) experience (2.1.7 of the assessment grid):	6 years of experience in DC in emerging economy projects.
Other (section 2.1.8 of the assessment grid):	Evidence of experience within the biodiversity economy and ABS; familiarity with the ABioSA Phase II body of work (Close-Out Report, Project End Report, Buyer Confidence Index, Stakeholder Satisfaction Survey, Knowledge Ecology framework) is an advantage.

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.

Expert 1 (2.2)

National short-term data coordinator.

Key tasks of the national data coordinator include:

- Review and confirm module and component-level indicators of the MEL framework (incl. international market access and buyer confidence indicators).
- Gathering EU and other end-market data on buyer perceptions, market trends, and non-tariff barrier developments to verify and update the Buyer Confidence Index and to support Outcome 1 and Outcome 2 indicators.
- Supporting the BCI design and analysis with international comparability.
- Responsible for preparation of reports through gathering of all different data from short-term experts in order to do first round of analysis, aggregation, findings, conclusion and recommendations based on the Southern African Context.
- Coordinate the KM documentation including event capture, story collection logs and stakeholder dialogue records under the Knowledge Ecology framework.
- Support to data gathering and contacts with required beneficiaries, partners and other stakeholders.
- Development and revision of data collection tools such as questionnaires and other survey tools.
- Data analysis (using qualitative methods and univariate and multivariate methods)
- Quality assurance for all collected data by expert pool.

Qualifications of the short-term national data coordinator:

Education/training (section 2.2.1 of the assessment grid):	University qualification first degree in business administration, economics, information management or relevant other degree
Language (section 2.2.2 of the assessment grid):	Fluent in English, both spoken and written (at least C1 according to the CEFR or comparable) (5 out of 10 Points) and fluent in one official South African language other than English, spoken (5 out of 10 Points)
General professional experience (section 2.2.3 of the assessment grid):	8 years of professional experience in data coordination, data management, or research administration roles, ideally within multi-stakeholder programmes
Specific professional experience (section 2.2.4 of the assessment grid):	5 years' experience working with mixed-methods data, including the integration of qualitative narrative evidence (such as MSC stories or SenseMaker signifiers) with quantitative indicator data within a biotrade, agriculture, natural products, or comparable value chains sector-level environment with European market comparison.
Leadership/management experience (section 2.2.5 of the assessment grid):	Not applicable
Regional professional experience (section 2.2.6 of the assessment grid):	3 years' experience of data collection in the southern African region
Development Cooperation experience (section 2.2.7 of the assessment grid):	3 years' experience in working in the sector of development cooperation
Other (section 2.2.8 of the assessment grid):	Familiarity with results-based management and logframe-driven reporting, including the operationalisation of indicators into measurable data points.

Short term expert pool 1 (minimum 2, maximum 6 members)

Tasks of the short-term expert pool 1

- Desktop study on documents provided.
- Development of survey questions/data collection tools
- Data collection (using qualitative and quantitative methods mentioned in the attached Annex A)
- Derive initial findings and recommendations from data
- Conduct interviews using pre-selected data collection tools
- Upload and save all completed questionnaires to the data collection software's server
- Report drafting
- Capturing and report on lessons learnt and challenges over the period of the project to be shared with the data coordinator and team leader
- Preparation of presentation and participation in discussion of studies with stakeholders

Qualifications of the short-term expert pool 1

Education/training (section 2.6.1 of the assessment grid):	University qualification, 1 expert with first degree in economics, business administration or relevant other and 1 expert with a bachelor's degree in information management, law or relevant other.
Language (section 2.6.2 of the assessment grid):	2 experts with C2-level language proficiency in English.
General professional experience (section 2.6.3 of the assessment grid):	7 years' experience working on desktop studies, data collection and analysis.
Specific professional experience (section 2.6.4 of the assessment grid):	1 expert with 2 years' experience with evidenced qualitative methods including MSC. 1 expert with 3 years' experience with evidenced quantitative methods including survey design, sampling, and indicator-tracking. 1 expert with 3 years' experience with evidenced KM or Knowledge Ecology/facilitation suitable for hosting Quo Vadis sessions, peer learning events, and sense-making workshops. 1 expert with 5 years' evidenced experience in the legal, ABS, or biodiversity-economy regulatory environment relevant to the FFR data interpretation.
Regional professional experience (section 2.6.5 of the assessment grid):	3 years of experience in projects in Southern African region, of which 2 years in projects in South Africa (country).
Development Cooperation experience (section 2.6.6 of the assessment grid):	1 expert with 3 years of experience in DC
Other (section 2.6.7 of the assessment grid):	Excellent report writing skills

****Please note that the Team Leader could also form part of the short-term technical expert pool, however the differentiation for this pool's daily rate will apply.**

****Qualifications of the enumerators will not be evaluated. Members of the pool can be exchanged and replaced in close coordination with GIZ.**

The tenderer must assign all the proposed experts 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.

7. Costing requirements

Assignment of personnel and travel expenses

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

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

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

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

Sustainability aspects for travel

GIZ has undertaken an obligation to reduce greenhouse gas emissions (CO₂ emissions) caused by travel. When preparing your tender, please incorporate options for reducing emissions, such as selecting the lowest emission booking class (economy) and using means of transport, airlines and flight routes with 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/ expert	Total	Comments
Designation of Team Lead	1	50	50	Team Leader could also form part of the technical expert pool
Designation of Data Coordinator	1	60	60	

Designation of short-term expert pool	6	25	150	Up to 6 experts permitted
Travel expenses	Quantity	Number/ expert	Total	Comments
Per-diem allowance in country of assignment (lumpsum)	1	20	R11,400	Fixed amount R570/day – SA Gauteng & Cape Town The per diems shall be split among the Experts, depending on the travel requirements
Overnight allowance in country of assignment (South Africa)	1	20		The overnight shall be split among the Experts, depending on the accommodation requirements
Transport	Quantity	Number/ expert	Total	Comments
Domestic flights	7 return	1		7 return flights within the country of assignment during service delivery – South Africa. Flights shall be split among the Experts, depending on the accommodation requirements
CO ₂ compensation for local air travel	7 return	1		A fixed budget is earmarked for settling carbon offsets against evidence.
Other travel expenses - lumpsum	1			Shuttle, car rental, train, own vehicle kms (4,95/km SARS rate), fuel, parking, tollgates etc.
Flexible remuneration	1	R80 000	R80 000	A budget of R80 000 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.

8. Inputs of GIZ or other actors

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

ABioSA will provide the contractor with:

- The following annexures mentioned further below: Annex A – E as part of the procurement pack.
- Access to all Phase II MEL deliverables, including the Close-Out Report, the Project End Report, the Buyer Confidence Index reports, the Stakeholder Satisfaction Survey, the Quo Vadis Summary, and the Knowledge Ecology framework document to the successful bidder.
- Introductions to the supported associations and to DFFE and other partners.
- Coordination support through the ABioSA Component Manager and Technical Advisor.
- Logistical support for presentation workshops and PSC meetings.
- No equipment is foreseen, if necessary, it shall be provided by the project.

The contractor is expected to actively engage with:

- The contracted Marketing and Communications service provider
- The contracted BioPANZA MSME pipeline support service provider
- The contracted associations that administer FFRs and IDAs.
- DFFE and other government partners under Outcome 3.
 - Specific reference should also be made to providing potential input into the DFFE market analysis and update of the commercial bioprospecting/biotrade market data review as set in the NBES.
- Sister projects (SIPPO, SSAIP, GQSP and the GIZ global biodiversity programme) where coherence assessment is required.

9. Data governance and confidentiality

Outsourced processing of personal data

The provisions on data protection and information security of the General Terms and Conditions of Contract apply.

Data protection

Personal data will be processed on behalf of GIZ. Therefore, an agreement on “Outsourcing of data processing (AuV)” will be concluded with the contractor in accordance with Art. 28 GDPR. For this purpose, the technical and organisational measures (TOM) for compliance with the data protection requirements must be outlined prior to conclusion of the contract. If the contractor has already been audited by GIZ in the past, an update in accordance with GDPR must nevertheless be sent. After a positive check, the contract is concluded with the AuV attachment.

10. Requirements on the format of the tender

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

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

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

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.

11. Annexes

Annexes A - E shall be shared as part of the procurement pack, Annex F – J will be shared with the successful bidder during the kick-off meeting.

1. Annex A: Considerations, templates and frameworks from Phase II, critical to this assignment.
2. Annex B: Project proposal also acting as project plan
3. Annex C: Phase III Logframe.
4. Annex D: Phase III Theory of Change diagram.
5. Annex E: Phase III Knowledge Ecology: Introduction and Overview as reference document.
6. Annex F: Phase II Quo Vadis Summary Report as reference document.
7. Annex G: Phase II Project End Report (10 February 2026) as reference document.
8. Annex H: Phase II Close-Out Report as reference document.
9. Annex I: Phase II Buyer Confidence Index Report (2025) as reference document.
10. Annex J: Phase II Stakeholder Satisfaction Survey Report (2025) as reference document.