

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

CONFIDENTIAL

Integrated Marketing, Communications and Knowledge Product support to the implementation of ABioSA Phase III	Project number/ cost centre: G-012159-201
	Tender number 7000016863

0.	List of abbreviations	2
1.	Brief information on the project.....	3
2.	Background	4
3.	Context.....	7
4.	Tasks to be performed by the contractor	9
5.	Concept.....	14
	Technical-methodological concept	14
	Project management of the contractor (1.6)	15
6.	Personnel concept.....	15
	Team Leader (2.1).....	15
	Expert 1 (2.2)	17
	Short-term Expert Pool 1 (2.6) – (minimum 4, maximum 6)	18
7.	Costing requirements	20
	Assignment of personnel and travel expenses	20
	Sustainability aspects for travel	20
8.	Inputs of GIZ or other actors.....	22
9.	Data governance and confidentiality.....	23
10.	Requirements on the format of the tender	23
11.	Annexes	24

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
BABS	Bioprospecting, Access and Benefit Sharing
BIA	BioInnovation Africa
BioPANZA	BioProducts Advancement Network South Africa
BMZ	German Federal Ministry for Economic Cooperation and Development
BSO	Business Support Organisation
CBD	Convention on Biological Diversity
CCPS	Centre for Cooperation with Private Sector
CMS	Content Management System
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
IPLC	Indigenous Peoples and Local Communities
KM	Knowledge Management
KP	Knowledge Products
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
POPIA	Protection of Personal Information Act
PR	Public Relations
PSC	Project Steering Committee
SECO	Swiss State Secretariat for Economic Affairs
SDP	Sector Development Plan
ToC	Theory of Change
ToRs	Terms of reference
The dtic	The Department of Trade, Industry and Competition

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. Phase III 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 Micro, Small and Medium Enterprise (MSME) compliance with ABS and market requirements in the biotrade sector. Implemented through a programmatic MSME pipeline supported by the BioProducts Advancement Network South Africa (BioPANZA) management 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 Business Support Organisations (BSOs), 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 will work within this modality alongside the MEL and KM service provider.

This Terms of Reference (ToR) is primarily focused on the Marketing, Communications and Knowledge Products (KPs) workstream within the Insight and Change Management modality of ABioSA Phase III. 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 marketing and communications must therefore not only showcase results but also surface, package and amplify the early signals of change that are captured through MEL and KM, so that learning is carried forward by stakeholders themselves.

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:

- Knowledge Management (KM)
- Monitoring, Evaluation and Learning (MEL)
- Events and Peer Learning
- Marketing and Communications
- 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 twofold. First, the project requires a coherent, donor-aligned marketing and communications function that promotes the visibility of ABioSA, its partners and its funders, and that strategically positions southern African biotrade products and enterprises in policy and market arenas. Second, the project requires deliberate curation, packaging and dissemination of evidence, stories and sector insights as KPs and knowledge artefacts¹, so that learning is not only documented but actively shared with stakeholders and

¹ Knowledge artefact in the ABioSA context is a codified, transmissible expression of learning that has been shaped from raw experience, story, or evidence into a form capable of circulating through the Knowledge Ecology. It is neither the raw data nor

carried forward beyond the project lifecycle. The Marketing and Communications service provider is therefore positioned as the public-facing curator and amplifier of content drawn from across the project's three outcome areas and from the work of the MEL and KM service provider.

This ToR draws directly on Section 5.3.5 of the ABioSA Phase III project proposal (see Annex B) on the ABioSA III Knowledge Ecology framework (see Annex E), both of which will be shared with bidders. It also builds on the Phase II Project Specific Communication, Public Relations and Marketing activities, the deliverables of which will be made available to the successful bidder as a reference baseline.

Position within the Insight and Change Management modality

The Marketing and Communications service provider works alongside, and is interdependent with the MEL and KM service provider operating within the Insight and Change Management modality. The relationship between the Marketing and Communications service provider and all participants and service providers of the three outcome areas and the meta-level cross-cutting activities is summarised in the table below. The service provider will, in most cases, receive content and source material from these workstreams and is responsible for transforming that material into polished KPs and knowledge artefacts.

Workstream / participant	Relationship with the Marketing and Communications service provider
Outcome 1 – MSME pipeline (micro level)	Receive raw content (profiles, diagnostics outcomes, mentoring case studies, referral stories) from the BioPANZA MSME pipeline support service provider, MSMEs and the ABioSA team. Convert into case studies, factsheets, short films, podcasts and photography that profile MSME progress [especially in preparation for the African Biotrade Festival (ABF 2027)] while observing consent and confidentiality and/or the BioPANZA MSME pipeline pilot itself. Highlight gender-disaggregated outcomes.
Outcome 2 – Sector associations and SDP implementers (meso level)	Receive content from contracted meso-level service provider, associations and BSOs on the seven SDP pillars, partnership agreements, transboundary or landscape-approach plans, and peer learning events. Develop sector briefs, case studies, association profiles, SDP communications, peer learning summaries and visual identity support for the relevant associations and even those not being

the final published product. It occupies the intermediate position: the processed learning output that the MEL and KM contractor captures and hands to the Communications service provider for formatting and dissemination. The sources from which artefacts originate, as named explicitly in Annex A section 4.9, are MSC stories, SenseMaker signifiers, BCI open-ended responses, stakeholder satisfaction survey responses, and stakeholder interviews. The Knowledge Ecology framework adds to this list: field visits, partnership agreements, and any reflection that "turns a practical learning step into a way of working that others can build on."

Workstream / participant	Relationship with the Marketing and Communications service provider
	funded by ABioSA in phase III in line with the systemic competitiveness framework.
Outcome 3 – Government and ABS enabling environment (macro level)	Receive content from the four-tier ABS approach service provider on national resources, inter-departmental forums, regional engagement, South-to-South peer learning, and from DFFE-led market analysis (if available). Support the ease of responding and making visible templates, Standard Operating Procedures (SoPs), policy briefs, regional dialogue summaries, infographics, audio-visual coverage of inter-departmental forums and South-to-South exchange material. Support DFFE communications in line with donor and government protocols.
MEL and KM service provider (meta level)	Receive quarterly insight memos from the MEL and KM service provider summarising emerging stories, lessons, Most Significant Change (MSC)/SenseMaker signifiers, Buyer Confidence Index (BCI) qualitative feedback and sector insights when available. Coordinate stories selected for publication, ensuring consent, accuracy and contextual integrity. The Marketing and Communications service provider remains responsible for relevant visual content/images, graphic design, editing, copywriting and the development of communication products from the input provided. The Marketing and Communications service provider will additionally support the development of source files, design templates and visual assets to the MEL and KM service provider where these support evaluation deliverables and stakeholder feedback from workshops.
Events and peer learning platforms (meta level)	Support communications, where and when requested before, during and after local, regional and national events including knowledge-sharing meetings, workshops, training events, conferences and special events. Direct support and input to the ABF 2027 and ABioSA Annual PSC meetings will be required.
Flexible risk management (meta level)	Support reputational risk awareness in all external communication, including pre-publication review for sensitive material, donor visibility, and consent and POPIA compliance for any personal data, story, image or recording featured in communication products.

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 Marketing and Communications service provider according to the agreed quarterly schedule and on an ad hoc basis as material insights arise. The Marketing and Communications service provider is responsible for converting that material into the KPs and knowledge artefacts described in Chapter 4 below of this ToR. If printing of KPs is required, the ABioSA project will be responsible for it, although it should be noted that **ABioSA would like to promote a paperless solution in its final phase.**

It should be noted that ABioSA Phase III is committed to transitioning toward print-free, electronically distributed KPs and knowledge artifacts across all components and stakeholder

engagements in as far as possible. This commitment reflects both environmental responsibility and the practical need to ensure that KPs remain accessible, updatable, and shareable beyond the project's lifetime. Achieving this transition requires deliberate investment in appropriate information technology solutions from the outset, particularly solutions that are accessible to the full range of ABioSA stakeholders, including MSME, sector associations and harvester communities operating in diverse connectivity environments. The Phase III inception period must therefore include a dedicated scoping process to assess stakeholder digital access capacity and identify fit-for-purpose platforms and formats, so that the shift to electronic knowledge products strengthens rather than inadvertently limits participation and knowledge flow across the sector. ABioSA will however consider the limitations within communities and will address these as they arise.

3. Context

From the outset, ABioSA has treated communication and marketing as core functions, not as add-ons. In Phases I and II, communication and marketing helped make South Africa's biotrade sectors visible and credible: translating complex issues into accessible language, building confidence among stakeholders, and creating entry points into policy and market debates. Communication provided a shared reference point within the biotrade sector, while marketing positioned enterprises and products in ways that built trust with and between stakeholders.

Phase III builds on this foundation but takes the role further. Communication and marketing now form part of the more coherent Knowledge Ecology, not only shaping visibility but also creating flows of meaning and connection across institutions, sectors and value chains. In this framing, they are strategic enablers of systemic competitiveness: lowering the cost of coordination, turning lessons into shared direction, and aligning diverse efforts at micro, meso, macro and meta levels.

The distinction in Phase III is that:

- **Communication becomes more than information flow.** It works as a living process that surfaces signals, lessons and stories from sectoral work and connects them into a wider conversation. For example, a processor's success in meeting export standards can be shared as a story that informs both other MSMEs and policymakers.
- **Marketing continues the work begun in Phases I and II** where the sector and project activities were given visibility, credibility and market entry points, and extends it towards strategic positioning of the sector. This also included highlighting the value of biotrade products in relation to sustainability, compliance and innovation, and amplifying narratives that strengthen credibility in within all the systemic competitiveness framework levels.

Phase III expands the range and reach of formats, such as podcasts, blogs and interactive media, so that stories and lessons travel further, generate dialogue within the biotrade sector stakeholders and its customer base, and foster greater resonance with policy, markets and the wider world. Placed within the Knowledge Ecology, communication and marketing act as

scaffolds: they provide frames for shared perspectives, bridge knowledge worlds, structure stories over time and reinforce collective memory. In practice, this means they will:

- Make small changes visible by highlighting early signals so they can spread.
- Strengthen connections by reducing the effort required for stakeholders to find each other and engage productively.
- Build trust through dialogue around sharing of risks, challenges and successes.
- Reinforce shared purpose by ensuring consistent narratives that align diverse efforts.
- Position the implementation of SDPs by animating their strengths in ways that influence markets, policy engagement and investment.

The Phase III communication and marketing strategy is co-designed as part of the Knowledge Ecology. Its role is not only to showcase results but to act as:

- **A mirror**, reflecting back what has been learned and achieved within the biotrade sector.
- **An amplifier**, carrying insights and narratives into the wider ecosystem to influence policy, attract support and inspire action.

Phase II legacy that the Phase III service provider must build on

Phase II produced a substantial body of communication and KPs that the Phase III service provider must use as the starting point. Key elements include:

- The ABioSA visual identity established during the end of Phase I and applied across Phase II material, to be maintained.
- The ABioSA website at www.abiosa.org, currently hosted and maintained under a separate contract, which the Phase III service provider will take over.
- A portfolio of KPs including case studies, briefs, factsheets, brochures, media articles, reports, good practice notes, short films, podcasts, reports, presentations and high-quality photography.
- A contact list of individuals, groups, organisations, fora and MSMEs, which will be handed over for continued maintenance and growth.
- Photo and video libraries from project events including the African Biotrade Festival 2023 and fieldwork.
- ABioSA LinkedIn page to be used as one of the media platforms.

In line with the broader Phase III approach, the Marketing and Communications service provider must adopt, adapt, or, where justified, retire individual Phase II instruments, justifying each decision in the inception report. The provider is required to align communication with SECO and the relevant SECO sister projects (SIPPO, SSAIP and GQSP, the GIZ umbrella GBF project and with DFFE and the BioPANZA.

4. Tasks to be performed by the contractor

The aim of this assignment is to appoint a service provider (*consultancy firm or consortium*) to provide **integrated Marketing, Communications and Knowledge Product support to the implementation of ABioSA Phase III**, under the Insight and Change Management modality. The service provider will operate alongside, and in close coordination with, the MEL and KM service provider and the contracted partners and supporting service providers delivering on the three outcome areas.

The service provider will design and implement a results-oriented Communications, Public Relations and Marketing strategy that:

- Promotes the ABioSA mandate, module objectives and indicators across the three project components.
- Highlights the legacy outcomes to be achieved over the period of the third and final phase of the project (See Annex B).
- Demonstrates the nature and intent of Swiss and SECO investment in southern Africa, with emphasis on the development of sustainable and competitive economic environments and systems.
- Curates and packages content received from the three outcome areas and from the MEL and KM service provider into accessible KPs and knowledge artefacts.
- Builds the visibility and positioning of southern African biotrade sector enterprises and value chains in policy and domestic and export market arenas.
- Maintains, develops and hosts the ABioSA website at www.abiosa.org as the primary public-facing repository of project information and KPs.
- Provides direct marketing and communications support to the ABF 2027 and to selected workshops, fora and conferences across the project lifecycle.
- Strengthens the communications capacity of the ABioSA project team, partners and beneficiaries through orientation, templates and good practice where required.

Building on the legacy of phase I and II, the service provider will support the project to:

- **Review and build on Phase II products and channels, not from scratch.** The contractor is required to adopt, adapt and where necessary retire the Phase II communication products, channels and templates, justifying each decision in the inception report.
- **Operate within the Knowledge Ecology.** The contractor will treat communication products as one of several knowledge flows within the Phase III Knowledge Ecology, linking material received from the MEL and KM service provider (MSC or SenseMaker signifiers, BCI qualitative feedback, satisfaction survey open-ended responses) with content from contracted outcome level service providers, MSMEs, associations and BSOs.

- **Support stewardship, not substitution.** The contractor will support MSMEs, associations and BSOs to develop and maintain their own communication assets and visual identity where this is part of enterprise-level and sector-level sustainability and self-agency.
- **Contribute to continuity beyond the project.** The contractor will produce communication scaffolds (templates, style guides, asset libraries, contact lists) that associations, BSOs and government partners can continue to operate after the project closes.

The contractor will be responsible for four ongoing tasks, conducted simultaneously throughout the contract period and phases described further below. The tasks build on the Phase II Project Specific Communication, Public Relations and Marketing Support and are updated to reflect the Phase III Knowledge Ecology and the integration with the MEL and KM service provider (See Annex A for further information on each of these tasks).

1. Promote the ABioSA mandate, module objectives and indicators across the three main components.
2. Develop knowledge products and knowledge artefacts to promote greater knowledge and information sharing among existing and new stakeholders and beneficiaries on important matters within the sector.
3. Host, maintain and develop the ABioSA website at www.abiosa.org and provide ongoing support to internal and partner communications.
4. Provide direct marketing and communications support to the ABF 2027 and selected workshops, fora and conferences.

The assignment is organised in four phases mirroring the project lifecycle, with communication, marketing and knowledge product work running continuously across every phase rather than separated into a standalone work package. The phases are:

- **Phase A:** Inception, strategy design and website handover (approximately the first 3 to 6 months of the assignment, September 2026 to February 2027)
- **Phase B:** Implementation, ABF 2027 mobilisation and ongoing KP and knowledge artifacts' production (approximately March 2027 to October 2027)
- **Phase C:** ABF 2027 delivery, close-out and post-ABF synthesis (approximately September 2027 to February 2028)
- **Phase D:** Continued implementation, close-out reporting and communications handover (approximately March 2028 to September 2028)

Each phase will contain the following core activities, adapted to its focus:

- Kick-off or review meeting with the ABioSA project team, DFFE and other parties.
- Desktop review of incoming material from the three outcome areas and the MEL and KM service provider.
- Production of KPs, knowledge artefacts and multimedia content.

- Website maintenance, hosting and content updates.
- Event communications support.
- Capacity building and orientation sessions where required.
- Reporting and quarterly feedback meetings.

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

Milestones/process steps/partial services	Deadline/place
Phase A: Inception, strategy design and website handover	First 3 – 6 months
Sub-activities: • Kick-off meeting and workshop with the ABioSA project team, including agreement on stakeholder list, event calendar and content pipeline from the three outcome areas and the MEL and KM service provider.	Upon signing of the contract
• Review of the Phase II communication legacy, including the Phase II close-out communications report, the existing knowledge product library, the photo and video archive, the contact list and the visual identity assets.	Ongoing during the phase period
• Scoping process to assess stakeholder digital access capacity and identify fit-for-purpose platforms and formats, so that the shift to electronic knowledge products strengthens rather than inadvertently limits participation and knowledge flow across the sector	
• Handover and technical take-over of the ABioSA website (www.abiosa.org) from the previous hosting arrangement, including transfer of domain, hosting, content management system credentials, backups and a technical audit report.	
• Co-design of the Phase III Communication, Public Relations and Marketing strategy with the ABioSA project team and key partners, drawing on the Knowledge Ecology framework.	
• Confirmation of the visual identity to be used in Phase III and update of the style guide if required.	
• Set-up of annual editorial, design and project management workflow with the ABioSA team, the MEL and KM service provider and the outcome-area contractors.	
Deliverables • Inception Report including the audit of Phase II communication legacy, decisions on adoption, adaptation or retirement of Phase II products and channels, the Phase III strategy outline, the proposed personnel assignment plan and the workplan. • Website Handover and Technical Audit Report documenting the take-over of www.abiosa.org and any proposed structural or content updates. • Phase III Communication, PR and Marketing Strategy.	By February 2027

• Updated visual identity style guide where applicable. • Short inception presentation to the ABioSA team and partners during the ABioSA Annual PSC meeting in February 2027.	
Phase B: Implementation, ABF 2027 mobilisation and ongoing KP and knowledge artifacts' production	± Mar – Oct'27
Sub-activities: • Ongoing production of KPs and knowledge artefacts from content received across the three outcome areas and from the MEL and KM service provider quarterly insight memo. • Ongoing website hosting, maintenance, content updates and uptime monitoring. • Production of monthly/quarterly news digests and e-newsletters. • Mobilisation of the ABF 2027 communications and marketing plan, including donor visibility, venue liaison, partner coordination, programme communications, social media campaign and procurement of promotional materials. • Communications support to selected workshops, fora and peer learning events across the three outcome areas. • Photography and video coverage of project events and initiatives. • Capacity building sessions with the ABioSA team, partners and selected beneficiaries on communication approaches, tools and good practices if needed.	Ongoing
Deliverables • Interim Report covering the period February 2027 to October 2027, including a register of KPs and knowledge artefacts produced, website analytics, monthly social media metrics and event communications coverage. • ABF 2027 Marketing and Communications Plan. • Monthly/quarterly news digests and e-newsletters. • Pre-ABF 2027 marketing campaign assets including programme materials, social media campaign, media engagement and donor visibility materials.	By October 2027
Phase C: ABF 2027 delivery, close-out and post-ABF synthesis	± Sept'27 – Feb'28
Sub-activities: • On-site marketing and communications coordination during the ABF 2027, including event branding, donor visibility, rapporteur services, photo and video coverage, social media coverage and press liaison. • Coordination of ABF photography and content support. • Coordination support to the MEL and KM service provider on the ABF 2027 Buyer Confidence Index data collection point and the Stakeholder Satisfaction Survey field deployment. • Post-ABF synthesis including the conference report, the graphic representation of conference tracks, the photo and video library and a "recommendations note".	Ongoing

- Continued KP and knowledge artifacts production drawing on ABF 2027 content. - Shirt mid-term presentation to the biotrade stakeholders at the ABioSA Annual PSC meeting in/by February 2028	
Deliverables: - ABF 2027 Conference Report, including the graphic representation of conference tracks, the photo and video library and “recommendations note”. - Mid-term Communications Report covering the period October 2027 to February 2028. - Post-ABF media and social media coverage report. - Short mid-term presentation workshop with the ABioSA team and partners.	By February 2028
Phase D: Continued implementation, close-out reporting and communications handover.	± Mar – Sept’28
Sub-activities: - Continued KP and knowledge artifacts’ production drawing on the close-out evidence from the MEL and KM service provider, including the final IDA scores, the final SDP Transition Tables, the close-out BCI, the Stakeholder Satisfaction Survey and the MSC final synthesis. - Continued website hosting, maintenance and content updates until final handover. - Production of close-out KPs including a Phase III impact summary, sector profile briefs and an end-of-project legacy publication. - Communications support to the close-out workshop, the close-out PSC meeting and any final partner engagement. - Handover of the website hosting arrangements, contact lists, asset libraries and visual identity files to ABioSA and to identified host organisations, with associated documentation. - Final ABioSA close-out communications report, including recommendations for the communication, PR and marketing strategy of any take-over of content, potential future phase or successor programme	Ongoing
Deliverables: - Final ABioSA Close-Out Communications Report. - Phase III impact/glossy summary and end-of-project legacy publication. - Final knowledge product and knowledge artefact register. - Final contact list of individuals, groups, organisations, fora and MSMEs. - Final record of digital photographs and short films. - Training material and training report covering the capacity building activities of the assignment. - Website handover register documenting the transfer of hosting, content management system credentials and asset libraries.	By September 2028

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|--|--|
| <ul style="list-style-type: none"> • “Recommendations note” on communication, PR and marketing strategy for any potential future phase or successor programme. • Final meeting on Phase III communications results with the ABioSA project team. | |
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Note: The ABioSA project team, the MEL and KM and other 3 outcome level service providers will in most cases provide the content and input material that will form the basis for the list of deliverables. The Marketing and Communications service provider is responsible for visual footage, curation, packaging, editing, design, production and dissemination. If any printing is required, the ABioSA project will be responsible for printing, unless otherwise agreed for a specific use such as the ABF 2027. Note the paperless solution earlier mentioned for phase III.

Period of assignment: from 1 October 2026 until 30 September 2028.

5. Concept

In the tender, the tenderer is required to show *how* the objectives defined in Chapter 4 (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 3 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 4 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 4 (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 4 (Tasks to be performed) (1.4.2).

The tenderer is required to describe its contribution to KM 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 4 (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.

Reports shall be structured and submitted according to deliverable requirements of chapter 4 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.

Reporting cycle: quarterly progress reports submitted one week before each quarterly team meeting with the ABioSA project team and the MEL and KM service provider. Each quarterly report will list the KPs and knowledge artefacts finalised in the period, workshop and event communications reports, the latest news digest, the latest contact list, the latest record of digital photographs and short films, and any training material developed over this period.

6. Personnel concept

The tenderer is required to provide personnel who are suited to filling the positions described, based on 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 in the technical assessment. The bidder is required to propose an expert-day distribution that is justifiable against the deliverables in Chapter 4 and 7.

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

Team Leader (2.1)

Please note that the Team Leader could have expertise listed under the short-term expert pool in addition to being team lead that should be highlighted in the proposal.

Tasks of the team leader

- Overall coordination and responsibility of the assignment in close cooperation with the ABioSA Component Manager in terms of organising and implementing the deliverables.
- Coordinating and ensuring communication together with the ABioSA project team, with the PSC members, partners and other stakeholders in the sector.
- Concept and design of the Phase III Communication, Public Relations and Marketing strategy, integrated with the Knowledge Ecology 2.0 framework.
- Personnel management, including the assignment, coordination and steering of short-term experts (incl. consortia members).
- Reporting (technical and financial) in accordance with deadlines.

- Quality assurance of all KPs, knowledge artefacts, website content and event communications material.
- Responsible for financial planning and use of funds in consultation with the ABioSA Component Manager.
- Responsible for facilitating PR and communication engagement, discussions, workshops, the ABF 2027 conference and the development of the communication message track.
- Coordination with the MEL and KM service provider on the quarterly insight memo and on stories selected for publication.

Qualifications of the team leader

Education / training (section 2.1.1 of the assessment grid):	University degree (Postgraduate) in communications, modern languages, journalism, public affairs, public relations, marketing, international relations, development studies or public administration.
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):	10 years of professional experience in media relations, public relations, journalism or communication, of which at least part of the experience is in the biotrade, natural products, agriculture or biodiversity-economy sector.
Specific professional experience (section 2.1.4 of the assessment grid):	10 years of experience in social change communication strategy, facilitation, including evidenced experience with at least one of the following: ABS or biodiversity-economy regulatory environment, EU non-tariff barrier communications for southern African plant species, or sector positioning for sustainability and compliance.
Leadership / management experience (section 2.1.5 of the assessment grid):	8 years of management/leadership experience as a project team leader, within a multi-disciplinary communications team (editorial, design, multimedia, web).
Regional experience (section 2.1.6 of the assessment grid):	5 years of experience on projects in the southern African region, of which 2 years on projects in South Africa.
Development cooperation experience (section 2.1.7 of the assessment grid):	6 years of experience in DC projects in emerging economy projects.
Other (section 2.1.8 of the assessment grid):	Familiarity with the ABioSA Phase II body of work (close-out communications report, KP portfolio,

	ABioSA visual identity, www.abiosa.org) is an advantage. Evidence of having delivered communications for a large regional or international event is an advantage.
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Expert 1 (2.2)

Tasks of Expert 1 – Content and KP coordinator

- Support to content gathering and contact with required beneficiaries, partners and other stakeholders, including the contracted MSMEs, associations, BSOs and government partners.
- Research, interviews, writing, photography and content creation for good practice notes, case studies and other knowledge products
- Responsible for the curation, version control and archiving of all KPs and knowledge artefacts produced incl. record of digital photographs and short films held by the project.
- Coordinate the receipt and triage of the quarterly insight memo from the MEL and KM service provider and the incoming content from the three outcome areas.
- Note taking, rapporteur services and report development, including coordination of event content.
- Maintenance and update of the stakeholder, partner and MSME contact list and database, in compliance with POPIA.
- Drawing initial findings from raw data and material.
- Support to documentation and monitoring of activities and work progress.

Qualifications of Expert 1

Education / training (section 2.2.1 of the assessment grid):	University qualification (first degree) in communications, journalism, business administration, information management or a relevant other degree.
Language (section 2.2.2 of the assessment grid):	Good business language skills in English, spoken and written (C2 according to CEFR). Fluency in at least one official South African language other than English is an advantage.
General professional experience (section 2.2.3 of the assessment grid):	8 years of professional experience in multi-stakeholder engagement, content coordination or communications project management in southern Africa.
Specific professional experience (section 2.2.4 of the assessment grid):	5 years of experience working with or in private sector or industry projects, ideally in the biotrade, natural products, agriculture or biodiversity-economy sector.

Regional experience (section 2.2.6 of the assessment grid):	3 years of experience on projects in the southern African region.
Development cooperation experience (section 2.2.7 of the assessment grid):	3 years of experience working in the sector of development cooperation.
Other (section 2.2.8 of the assessment grid):	Evidence of having completed business reports, case studies, factsheets and evaluation documents. Familiarity with POPIA requirements for consent and personal data handling.

Short-term Expert Pool 1 (2.6) – (minimum 4, maximum 6)

Tasks of short-term expert pool

The expert pool must collectively cover editorial, graphic design, multimedia production (photography, short film, podcast) and web (hosting, content management, search-engine basics) capability. For the technical assessment, an average of the qualifications of all specified members of the expert pool is calculated.

- Development of communication products under the deliverables listed in Chapter 4, including newsletters, case studies, briefs, brochures, infographics, social media content, blogs and podcasts.
- Editing and proofreading of project reports, knowledge products and other communication products.
- Coordination and facilitation support for the ABF 2027 communications with the ABioSA and DFFE team.
- Layout, design and production of publications, brochures, infographics and other communication products in line with the ABioSA visual identity.
- Short film and video production including pre-production, production and post-production (editing, transcription, sub-titles, sound capture) where needed.
- Podcast production including scripting, recording, editing and publishing.
- High-quality photography of project activities, events and beneficiary at their sites, with informed consent and POPIA compliance.
- Hosting, maintenance and content publishing on the ABioSA website (www.abiosa.org), including content management system updates, security patching, backups, uptime monitoring and basic search-engine optimisation.
- Basic research and sourcing of graphic elements such as photographic images, maps and infographics, with appropriate licensing.
- Delivery of PR, advocacy and communication training as part of the capacity building activities where may be needed.

Qualifications of short-term expert pool 1

Education / training (section 2.6.1 of the assessment grid):	1 expert with a bachelor's degree in journalism, communications or a relevant other field; 1 expert with a bachelor's degree in graphic design or a
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	relevant other field; 1 expert with a college or university diploma or degree in video, audio or multimedia production; and 1 expert with evidenced training and certification in web hosting, content management systems and web maintenance.
Language (section 2.6.2 of the assessment grid):	Good business language skills in English, spoken and written (C2 according to CEFR). At least 1 expert with fluency in one additional national language (Afrikaans, isiZulu, isiXhosa, Sesotho or another official South African language) other than that spoken by the Team Leader.
General professional experience (section 2.6.3 of the assessment grid):	1 expert with 7 years of experience working on conception, design, packaging, production and dissemination of communication products to a variety of audiences and channels in the biotrade, natural products or agricultural sector; 1 expert with 5 years of experience in short film or video production including pre-production, production and post-production; 1 expert with 5 years of experience in web hosting and content management system administration (WordPress or equivalent).
Specific professional experience (section 2.6.4 of the assessment grid):	1 expert with 5 years of experience writing, editing and proofreading and the ability to convey complex ideas in a concise, clear and direct style; 1 expert with 2 years of professional experience in video and photographic work with MSMEs and rural community members in the biotrade sector with documented informed consent practice; 1 expert with evidenced experience in podcast production; 1 expert with evidenced experience in donor-funded visibility and branding compliance.
Regional experience (section 2.6.5 of the assessment grid):	3 years of experience on projects in the southern African region, of which 2 years on projects in South Africa.
Development cooperation experience (section 2.6.6 of the assessment grid):	1 expert with 3 years of experience in development cooperation projects.
Other (section 2.6.7 of the assessment grid):	Excellent command of relevant computer software such as MS Office, WordPress (or equivalent CMS), Adobe InDesign, Adobe Illustrator, Adobe Photoshop, Adobe Premiere Pro or equivalent video editing software, and digital audio editing software (Audacity, Adobe Audition or equivalent).

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

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 a 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
Team Lead	1	80	80	Team Leader could also form part of the technical expert pool
Expert 1	1	60	60	
Short-term expert pool	6	20	120	Up to 6 experts permitted
Travel expenses	Quantity	Number/ expert	Total	Comments
Per-diem allowance in country of assignment (lumpsum)	1	20		Up to 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		Up to R2,800/night The overnight shall be split among the Experts, depending on the accommodation requirements
Transport	Quantity	Number/ expert	Total	Comments
Domestic flights	10 single flights	1		10 single-leg flights (5 return flights) within South Africa shall be split among the Experts, depending on the travel requirements
CO ₂ compensation for local air travel	10 single flights	1		A fixed budget is earmarked for settling carbon offsets against evidence.

Other travel expenses - lumpsum	1			Use of shuttle, car rental, train, own vehicle kms @R4.95km, fuel, parking, tollgates etc.
Website hosting fee	25			Website hosting, domain renewal and security and any relevant online/website related costs: lump sum to be costed by the bidder against documentary evidence and reconciled annually.
Design and production related costs.	1			Any additional visual footage, curation, packaging, editing, printing, music, design, production and dissemination expenses. This budget is only for expenses incurred related to design and production costs against evidence.
Flexible	1	R70 000	R70 000	A budget of R70 000 is foreseen for flexible remuneration. Please incorporate this lump sum budget into the price schedule. Use of the flexible remuneration item requires prior written approval from GIZ. These funds can only be used to top-up existing budget line items as stipulated in the contract.

8. Inputs of GIZ or other actors

ABioSA will provide the contractor with:

- The Annexes A to E referenced in Chapter 11 below as part of the procurement pack.
- Access to all Phase II marketing and communications deliverables, including the knowledge product portfolio, the photo and video archive, the contact list and the ABioSA visual identity assets, to the successful bidder.
- The Phase II MEL and KM deliverables (Close-Out Report, Project End Report, Buyer Confidence Index reports, Stakeholder Satisfaction Survey, Quo Vadis Summary, Knowledge Ecology framework), shared by the MEL and KM service provider where these inform content production.
- Introductions to the other service providers, supported MSMEs, associations and to DFFE, the dtic and other partners.
- Coordination support by the ABioSA Component Manager and the Technical Advisor.

- Logistical support for ABioSA Annual PSC meetings, close-out workshops and selected partner events.
- Printing of reports, documents, banners and other materials through the GIZ CCPS office, in collaboration with the bidder (if needed taking into account the ABioSA print free commitment as mentioned under Chapter 2.
- No equipment is foreseen. If necessary, it shall be provided by the project.

The contractor is expected to actively engage with:

- The contracted MEL and KM service provider, on the quarterly insight memo, story selection and visual assets.
- The contracted BioPANZA MSME pipeline support service provider, for MSME-level content.
- The contracted Meso-level service provider, associations and BSOs that implement Sector Development Plans.
- The contracted Macro-level service provider, DFFE, the dtic and other government partners.
- SECO sister projects (SIPPO, SSAIP, GQSP) and the GIZ global biodiversity umbrella project where coherence and joint communications are 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 5) 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 6 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 7 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 to E shall be shared as part of the procurement pack. Annexes F to K will be shared with the successful bidder during the kick-off meeting.

- Annex A: Additional information on tasks to perform
- Annex B: ABioSA Phase III project proposal, also acting as project plan (with specific reference to Section 5.3.5 Marketing and communication).
- Annex C: ABioSA Phase III Logframe.
- Annex D: ABioSA Phase III Theory of Change diagram.
- Annex E: ABioSA III Knowledge Ecology: Introduction and Overview as reference document.
- Annex F: ABioSA visual identity style guide and brand assets (Phase I and II).
- Annex G: ABioSA Phase II knowledge product portfolio inventory.
- Annex H: ABioSA www.abiosa.org website technical handover pack (current hosting, content management system, credentials, analytics).
- Annex I: Phase II contact list of individuals, groups, organisations, fora and MSMEs (POPIA-compliant version).
- Annex J: Phase II photo and video library inventory.
- Annex K: ToR of the MEL and KM service provider, for coordination reference.