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General information

a. Brief information on the project

Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) has been mandated by the German Federal Ministry for Economic Cooperation and Development (BMZ) to implement a global project operating under the title “Supporting sustainability aspects in the implementation of EU Economic Partnership Agreements (NEW)” in order to foster EPA implementation by regional organisations, their member states, the private sector and civil society in a way that supports sustainable development. The first phase of the project was implemented during the period of May 2017 to April 2020, the current phase is commissioned to run from May 2020 until February 2024. The project operates cross-regionally, with a focus on Southern Africa (SADC EPA), Eastern and Southern Africa (ESA EPA) and the Caribbean (CARIFORUM EPA).

The GIZ NEW project’s interventions are organized around three main areas:

- (1) Facilitating the establishment of participatory EPA monitoring systems, providing methodological as well as institutional support. (Output area 1)
- (2) Strengthening the capacity of public and private sector actors to (a) make best use of the potentials of the EPA for sustainable development and to (b) recognize and mitigate potential risks for sustainable development. (Output area 2)
- (3) Developing cross-regional exchange of public and civil society actors on implementing and deepening the EPAs with a view to supporting sustainable development. (Output area 3)

b. Context

At the design stage of the current phase of the NEW project, desired project results were defined on output and outcome level and respective indicators were agreed with the commissioning party (BMZ): Results at outcome level are to be measured by five so-called “Module Indicators”, results at output level by five output indicators. Please refer to the Annex “Results Matrix” for further details.

To measure progress towards the indicators and to capture evidence the project has set up an internal monitoring system, tracking milestones and progress towards indicator achievements in the project’s intervention areas.

Two of the Module Indicators require an ex-post evaluation and thus have not been measured and assessed so far. The ex-post evaluation shall take place in 2023 and is at the center of this assignment.

c. Objective

The assignment, that is the subject of this tender, aims to assist the NEW project in its evaluation and evidence (data) capture for two (2) out of its five (5) module indicators (MI). These are NEW’s module indicator 3 and 5. Module indicator 3 relates to Output 2 of the project which focusses on the SADC region, whereas module indicator 5 to relates to Output 3 that covers the CARIFORUM, ESA and SADC regions. The information on the aim, measurement, and sources of data for these two indicators, as approved by the BMZ during the project design phase, are as follows:

Indicator	Sources
<p>Module objective indicator 3</p> <p>Thirty of 50 surveyed representatives of national agencies from the SADC region, who are responsible for implementing EPA provisions, have presented specific examples that demonstrate how their organisation’s contribution to sustainable implementation of the EPAs has changed.</p> <p>Baseline value: 0 representatives of national agencies</p> <p>Target value: 30 representatives of national agencies</p>	<p>Survey of 30 representatives of national agencies (public sector) in the SADC region who have participated in training measures on how they are applying the knowledge acquired. The EPA provisions apply to, for example, trade safeguards, sanitary and phytosanitary measures (SPS) and possibilities of cumulation to comply with rules of origin. One specific change, for example, is the introduction of a new process on applying the cumulation rules on the origin of products contained in the EPAs.</p>

<p>Module objective indicator 5</p> <p>Thirty of 40 surveyed participants in cross-regional exchange formats on sustainable implementation of EPAs have each provided one example that demonstrates how they have used the knowledge acquired at the events to contribute towards realising potentials of the EPAs or averting risks.</p> <p>Baseline value: 0 (no exchange format yet)</p> <p>Target value: 30 participants, one example each</p>	<p>Survey of 40 participants in cross-regional exchange forums in the CARIFORUM, ESA and SADC regions on how they are applying the knowledge acquired.</p> <p>Participants are representatives of regional organisations, ministries, agencies, business associations, companies and/or civil society organisations from the CARIFORUM, SADC and ESA region.</p>
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The aim of this assignment is to conduct the evidence/data capture as outlined in the sources section of both indicators.

In addition, the evaluation shall collect further information on Output indicators 2.1.,3.1 and 3.2 to triangulate and complement the information the project has already collected via standardized questionnaires at the end of each partner event. These output indicators are as follows:

Output indicator 2.1:

Out of 180 representatives of national agencies of the SADC EPA member states who are entrusted with implementing EPA provisions, 144 have confirmed that they have acquired significant new skills for implementing EPA provisions.

Output indicator 3.1

Thirty (30) of 40 civil society and public sector participants in supraregional exchange forums have confirmed that they have acquired significant skills to assess potentials and risks of the EPA for sustainable development in their region.

Output indicator 3.2

Thirty of 40 public sector participants in supraregional exchange forums have confirmed that they have acquired significant skills for negotiating deeper EPAs.

To fulfil the capacity development needs required to achieve these indicators, the NEW project has already been implementing a variety of measures throughout its implementation.

- For MI 3 and output indicator 2.1: several trainings on various aspects of EPA implementation were held in the SADC region. These targeted national officials. They are trainings on
 - o EPA safeguards
 - o EPA Rules of Origin
 - o EPA Monitoring
- For MI 5 and output indicators 3.1 and 3.2: the NEW project has implemented multiple cross regional exchanges and plans continue implementing these in 2023. Implemented exchanges are:
 - o Trade in Services under EPAs (05/2022)
 - o EPA Trade and Sustainable Development provisions (11/2022)
 - o Involvement of civil society in the monitoring of EPAs (02/2023)

- *Effects of EU autonomous measures on trade under the EPAs (08/2023)*
- *In-person cross-regional exchange on multiple topics (10/2023)*

Given these implemented activities, the NEW project will provide to the Company the respective participants lists and contact details from the SADC trainings and cross-regional exchanges to identify potential interview partners for the evaluation of MI 3 and MI 5 and the relevant output indicators (2.1; 3.1; 3.2).

Furthermore, there are currently up to 2 in-person events being planned, that will likely bring together many of the relevant officials and past participants. Thus, these events can be an opportunity to conduct the relevant interviews in person. Currently the events are planned for Q4 2023. If applicable to the proposed data capture methodology and still relevant for the completion of all necessary interviews, travel budget for the participation at these events can be made available (see Chapter 3 below).

d. Expected results

At the end of the intervention, the following results/ deliverables are expected:

- Finalized interview question catalogue verified by the GIZ NEW team
- Surveys and/or interviews have been conducted with 1) 50 representatives of national agencies from the SADC region and 2) 40 participants from cross-regional exchanges previously organized by NEW
- An overview of the examples provided by the 50 SADC national officials interviewed that demonstrate how their organisation's contribution to sustainable implementation of the EPAs has changed.
- An overview of the examples provided by the 40 participants of cross-regional exchanges that demonstrates how they have used the knowledge acquired at the events to contribute towards realising potentials of the EPAs or averting risks.
- Excel table containing per interviewee the interview results (questionnaire) and basic information on participants' characteristics (e.g. country/region, type of institution, gender) in anonymised form.
- Overview of examples from interviews of participants in cross-regional exchanges demonstrating how participants have used the inputs for ESA deepening negotiations or the SADC EPA Review (Reference to Output Indicator 3.2)
- Overview of examples from interviews with representatives of national institutions that participated in project capacity development measures, demonstrating how they have used the acquired know-how and/or the developed material on EPA Safeguards and Rules of Origin in their respective institutions (Reference to Output indicator 2.1)

e. GIZ shall hire the contractor for the anticipated contract term, from 01.10.2023 to 31.01.2024.

f. The contractor shall provide the following work/service:

- Design an evaluation methodology for the surveying and/or interviewing of 50 SADC national officials and 40 EPA cross-regional exchange participants
- Prepare, further refine (based on feedback from the NEW project) and finalize
 - A set of interview questions in English and Portuguese language
 - A format for capturing the examples and further data resulting from the interviews/survey including gender-disaggregated data collection
- Draw up the logistical planning and schedule the required interviews
- Conduct interviews of 50 SADC national officials and 40 EPA cross-regional exchange participants. Except where the contractor will be required to travel to interview participants at the up to two regional workshops in SADC (see section 4), all

interviews will be expected to be conducted remotely. The great majority of interviews will be conducted in English language. Interviews with officials from Mozambique shall be conducted in Portuguese language.

- Document interview results in previously agreed format/ Excel table
- In case that targets cannot be met, provide a report on the challenges and rationale behind the failure to meet the targets

On steering of this support:

- The contractor manages costs and expenditures, accounting processes and invoicing in line with the requirements of GIZ.
- The contractor will present an Inception report following a kick off meeting (max 3 pages). This report outlines the approach and concrete timelines for the activities.

Certain milestones, as laid out in the table below, are to be achieved during the contract term:

Milestones/process steps/partial services	Deadline/place/person responsible
Inception report	October 2023
50 SADC national officials and 40 EPA cross-regional participants surveyed	December 2023
Examples each fulfilling the requirements of MI 3 and MI 5 are captured; anonymised interview results documented in excel table	31 st January 2024

Total number of assignment days: **34 days**

Note: Bids/Proposals that exceed the assignment days will not be considered for evaluation. The days must be spread/ shared amongst the proposed team.

Data protection

The performance of the contract may be associated with the processing of personal data by the contractor, who would alone define the nature of such data and how such processing would be carried out. In such cases, the contractor shall act as an **independent data controller** and must **alone** comply with **all** applicable data protection obligations, including regional and local laws. The data protection principles such as lawfulness, purpose limitation, storage limitation, transparency, integrity and confidentiality, and accountability, as well as the numerous rights of the data subject must be paid due attention to. The EU General Data Protection Regulations' (GDPR) data transfer rules must be considered whenever personal data leaves the EU for a third country. The GIZ is **not** in any way responsible for such processing and, apart from non-personal data (company data or statistics), the GIZ does not expect to receive any personal data from the contractor.

1. Tender requirements

1. Qualifications of proposed staff

The bidder is expected to propose a team of two (2) experts to undertake the assignment, with the following qualifications

1.1. Expert 1:

1.1.1. General qualifications

- Education: University qualification (first degree/master's) in economics, international relations, political science or related field.
- Professional experience: 15 years' experience in development cooperation, regional integration and/or international trade and 10 years experience in the monitoring of (development cooperation) projects; 10 years experience in project implementation, monitoring, and project management in a development cooperation context.

1.1.2. Experience in the region/knowledge of the country

5 years of regional experience in the SADC or ESA region

1.1.3. Language skills

business fluency in English

1.2. Expert 2:

1.2.1. General qualifications

- Education/training: University qualification (first degree/master's) in economics, international relations, political science or related field.
- Specific professional experience: 10 years' experience in development cooperation, regional integration and/or international trade and 10 years experience in the monitoring of (development cooperation) projects; 10 years experience in project implementation, monitoring, and project management in a development cooperation context

1.2.2. Experience in the region/knowledge of the country

5 years of regional experience in the SADC and/or ESA region

1.2.3. Language skills

Business fluency in English and Portuguese

Note: The bidder shall also propose how the expert days would be allocated to the proposed experts.

2. Appropriateness of proposed concept

In the tender, the tenderer is required to show *how* the objectives defined (Tasks to be performed) are to be achieved, if applicable under consideration of further method-related requirements (technical-methodological concept).

The technical concept provided as part of the bid will be evaluated according to the following criteria:

- Understanding of the objectives and project needs (2.1)
- Understanding of the relevant partners and institutions involved. Demonstration of how the identified target audiences (i.e., interview partners) are best addressed and approached (2.2)
- Explanation of methodology to be used to facilitate the capture of the required monitoring and evaluation data (2.3)
- First work plan and draft proposal for outreach and scheduling of interviews (2.4)

3. Specification of inputs

Sustainability aspects for travel

GIZ would like to reduce greenhouse gas emissions (CO₂ emissions) caused by travel. When preparing your tender, please incorporate options for reducing emissions, such as selecting the lowest-emission booking class (economy) and using means of transport, airlines and flight routes with a higher CO₂ efficiency. For short distances, travel by train (second class) or e-mobility should be the preferred option.

If they cannot be avoided, CO₂ emissions caused by air travel should be offset. GIZ specifies a budget for this, through which the carbon offsets can be settled against evidence.

The market for carbon credits is made up of a large number of providers, each with different claims as to their climate impact. The [Development and Climate Alliance](#) has published a [list of standards](#). GIZ recommends using the standards specified there

Fee days	Number of Experts	Number of expert days	Comments
<ul style="list-style-type: none"> • Preparation/debriefing 	2	8	Inception report, defining the methodology, logistical planning and outreach.
<ul style="list-style-type: none"> • Implementation 	2	26	Conduct of interviews, Data clean up, presentation/reporting of results
Travel expenses for anticipated travel to Johannesburg, South Africa to attend two regional workshops	Number of experts	Number of days/nights per experts	Comments
<ul style="list-style-type: none"> • Per-diem allowance in country of assignment 	1	4	To attend up to 2 regional workshops (in SADC region), if required and agreed with NEW project.

			Current estimate is each workshop spanning 2 days
<ul style="list-style-type: none"> Overnight allowance in country of assignment 	1	4	To attend up to 2 regional workshops (in SADC region), if required and agreed with NEW project. Current estimate is each workshop spanning 2 days (2 nights)
<ul style="list-style-type: none"> Travel costs (train, private vehicle) 	1	2	To attend up to 2 regional workshops (in SADC region), if required and agreed with NEW project.
Flights	Number of experts	Number of flights per experts	Comments
<ul style="list-style-type: none"> International flights 	1	2	To attend up to 2 regional workshops (in SADC region), if required and agreed with NEW project
<ul style="list-style-type: none"> Domestic flights 	0	0	
<ul style="list-style-type: none"> CO₂ compensation for air travel Guidance for GIZ service providers on avoiding, reducing and offsetting GHG emissions (giz.de) 	1	2 round trips (4 flights)	Guidance of adequate carbon-offsetting is provided above. Provided against the evidence of carbon offset certificates.
Other costs	Number of experts	Amount per experts	Comments

Calculate your financial bid exactly in line with the quantitative requirements of the specification of inputs above. There is no contractual right to use up the full days/travel or workshops or budgets. The number of days/travel/workshops and the budgets will be contractually agreed as **maximum amounts**. The regulations on pricing are contained in the price schedule.

4. Requirements on the format of the tender

The CV submitted for each expert can have a maximum of four (4) pages. The **concept** should not exceed five (5) pages. 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.