

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

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| Project title: Nile Delta Water Management | Processing number/cost centre: 2019.2006.5-001.00 |
| Country: Egypt | Transaction number: 83419700' |
| Subject of the tender procedure: Leadership Development Programme for Water and Wastewater | |

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0. List of abbreviations

| | |
|------------|--|
| AC | Affiliated Companies |
| BMZ | The German Federal Ministry for Economic Cooperation and Development |
| Contractor | The Service Provider |
| DC | Development Cooperation |
| GIZ | Deutsche Gesellschaft für Internationale Zusammenarbeit |
| GIZ-AV | GIZ Project Manager |
| HCWW | The Holding Company for Water and Wastewater |
| KOMP | Cost-output monitoring and forecast |
| MALR | The Ministry of Agriculture and Land Reclamation |
| MoHUUC | Ministry of Housing, Utilities and Urban Communities |
| NDWM | Nile Delta Water Management Programme |
| TC | Technical Cooperation Measure |
| ToRs | Terms of Reference |

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1. Context

1.1. General framework conditions for the intervention

The Nile covers 85% of the country's water needs for all areas of life. The effects of climate change and an increased use of the Nile water in the countries of the upper reaches of the Nile will lead to reduced water availability in Egypt in the future. Rising temperatures, longer and more intense periods of heat and drought, shifting climate zones as well as changes in the water supply (increasing seawater infiltration, decreasing water quality and pollution of water resources) are noticeable.

In the medium- to long-term planning, Ministry of Water Resources and Irrigation (MWRI) assumes that the Nile can only cover 75% of Egypt's future water needs. This makes efficient and integrated management of the limited water resources represents a vital necessity for Egypt to ensure a sustainable economic and social development in the future.

The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) was commissioned by the German Federal Ministry for Economic Cooperation and Development (BMZ) to implement a new Technical Cooperation Measure "Nile Delta Water Management Programme (NDWM)". The scheduled implementation period for the new project is July 2021 to June 2024.

In line with the BMZ country strategy and the results of the governmental negotiation of October 2018, two TC modules were merged into one integrated module with two sub-sectors, (1) water supply and wastewater management and (2) irrigated agriculture.

NDWM aims to continue the cooperation with the partner organisations and strengthening their capacities to address the reduction of water loss and the efficient water use, taking into account the climate change in the irrigated agriculture - and in the water supply and wastewater sub-sector.

For the water supply and wastewater management sub-sector, project partners at the national level are the Ministry of Housing, Utilities and Urban Communities (MoHUUC) represented by the Holding Company for Water and Wastewater (HCWW) and its Affiliated Companies (ACs). As for the irrigated agriculture sub-sector, partners are the Ministry of Agriculture and Land Reclamation (MALR) and its extension services sector and agriculture service sector.

The MoHUUC is responsible for the formulation of national policies and for the political steering of utilities services. However, it still does not have an institutional structure for this governance of the water sector. Tasks in this area are currently performed by a World Bank-financed project management unit within the ministry. Hence, direct cooperation with the ministry is only possible to a very limited extent.

The ACs are responsible for the treatment, distribution, and sale of drinking water and for the collection, treatment, and safe disposal/reuse of wastewater under the supervision of the HCWW. Its management staff is increasingly well trained and professional. There are nearly 800 employees in the HCWW and more than 130,000 employees in the ACs. Middle managers lack experience in a wide range of areas.

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Due to the long-standing recruitment freeze, the extension service in the governorates has fewer and fewer staff and insufficient resources to provide services needed by female and male farmers.

In the water supply and wastewater sub-sector, NDWM aims at supporting the MoHUUC represented by the HCWW and its ACs to reduce water loss and increase water use efficiency for the entire Egyptian population through measures at national and regional level.

1.2. Coordination with other development partners

Due to its regional political significance, Egypt is an important partner for Germany in the field of international cooperation. Since 1956, GIZ has been implementing projects in all parts of the country on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ). GIZ also works on behalf of other German public sector clients and international organisations. The NDWM is part of the German DC programme Water Resources Management in Egypt. It cooperates with the Financial Cooperation module “Sector Programme for Sanitation and Water Management” in the Nile Delta. It also interacts with the multi-donor project “National Drainage Programme”, through which field drainage systems are being renewed and irrigation infrastructure modernised.

NDWM cooperates with its TC modules “National Solid Waste Management Programme” as well as the two Financial Cooperation modules in selected Nile Delta governorates to reduce the pollution of irrigation canals by municipal waste, which will increase the availability of usable water. Further references exist in the cooperation in the areas of awareness raising as well as civil society involvement.

Also, NDWM is in close cooperation with the TC module “Egyptian-German Joint Committee on Renewable Energy, Energy Efficiency and Environmental Protection” in measures related to improve energy efficiency in water utilities.

In addition to the German development cooperation, other donors are active. In the water supply and wastewater management sub-sector, development banks, such as World Bank, are using the digital Decision Support System (DSS) for planning infrastructure projects. The digital DSS for energy saving (EnDSS) will be consolidated with other software packages and the database on water losses (NRW database) shall be rolled out nationwide.

Close cooperation is planned with the United States Agency for International Development (USAID) for the development of business plans and management capacities for the HCWW and the ACs.

1.3. Brief description of the intervention

NDWM adopts a comprehensive approach including both sub-sectors, water supply and wastewater management as well as irrigated agriculture. Benefitting from several decades of experience in these sectors, the NDWM combines the upscaling of successful approaches from previous phases with the development of innovative measures, based on identified needs by the partner institutions and target groups.

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The overall objective of NDWM Programme is to improve the framework conditions for an efficient use of water in water supply and wastewater management as well as in irrigated agriculture in the Nile Delta.

In the water supply and wastewater sub-sector, NDWM shall support the MoHUUC represented by the HCWW and its ACs to reduce water loss and increase water use efficiency through measures at national and regional level.

Capacity development and human resources development activities are at the cornerstone of the project's activities.

Processing of personal data is not relevant for project implementation. and the Contractor shall be obliged to comply with anonymized data processing principles.

These terms of reference are focusing on the water supply and wastewater management sub-sector only.

2. Tasks to be performed by the contractor

2.1. Introduction

The Contractor shall comply with the eligibility criteria according to the assessment sheet and provide evidence about reference projects as specified in the assessment sheet.

The **overall duration of the Contract shall be 18 months from the contract award** (anticipated November 2022).

2.2. Reference to the project outcome and to project outputs

The Contractor shall focus on the anticipated overall project objective:

“Framework conditions for an efficient use of water in water supply and wastewater management as well as in irrigated agriculture in the Nile Delta are improved.”

The project activities are clustered in five output areas as follows:

- Subsector Water and Wastewater:
 - (1) strengthening management capacities of water and wastewater ACs for an efficient water use.
 - (2) initiating measures for efficient water use and climate-sensitive operation of water and wastewater systems by ACs.
- Subsector Irrigated Agriculture:
 - (3) improving the range of advice and services for smallholder farms on water-saving cultivation practices.
 - (4) initiating innovative measures and digital applications for efficient water use by smallholder farms.
- Crosscutting:
 - (5) strengthening the participation of civil society and women's groups in water use efficiency.

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The Contractor shall assume tasks related to **output area 1** as detailed below. This will require close coordination between the team of the Contractor and the GIZ project team.

Outcome, outputs, and indicators refer to the attached module proposal (Annex 1) and result matrix (Annex 2) which are binding components of the project agreement between GIZ and BMZ. Values related to baselines and targets as well as means for verification are detailed in the result matrix and shall be considered accordingly.

2.3. Tasks related to Output 1

Output 1 aims to strengthen management capacities of HCWW and ACs. The HCWW and ACs shall be supported in the development of an executive monitoring tool for the top management level (chairman and general directors) which shall be based on jointly developed 5-year business plans for utility management of ACs. This should provide ACs with essential tools for strategic planning and decision making for utility management and service provision considering an optimum utilization of resources. Additionally, standardized operating procedures in ACs are to be expanded to include warehouses management to improve procurement and transparency. Moreover, capacities of HCWW, ACs and the New Urban Communities Authority (NUCA) staff on contract design, management and monitoring of contract performance will be strengthened. The tasks in this paragraph will be coordinated solely by the GIZ team.

Furthermore, output 1 targets the development and implementation of gender-specific leadership development programmes for selected professionals from ACs which will ensure that managerial needs of female professionals are better addressed. This shall be considered in the approach of the Contractor.

The Contractor is expected to develop and implement the leadership development programme for professionals from selected ACs and the HCWW and provide technical expertise and recommendation for the HCWW to manage and implement this programme.

The Contractor shall be responsible to implement tasks related to the achievement of **Output 1: Strengthening management capacities of water and wastewater ACs for an efficient water use.**

Tasks of the Contractor shall address output indicator 1.2

15 out of 75 participants in the leadership development programme of ACs are female professionals.

Specific tasks of the Contractor related to this indicator include:

GIZ and HCWW plan to develop and implement a leadership development programme which focuses on the development of 150 preidentified future leaders' behavioural competencies and leadership skillsets. The programme has been designed to meet a range of GIZ and HCWW leadership organizational needs and programme criteria.

The Service Provider shall develop and deliver a thought-provoking leadership programme taking diversity, equity and inclusion norms into consideration. This TOR covers the key elements of the leadership selection programme. The following behavioural leadership competencies represent some of the critical competencies that GIZ and HCWW consider as critical attributes of potential HCWW leaders withing HCWW affiliate company candidates.

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1. **Leadership:** Exploring leadership styles which prioritizes positive behaviours, employee motivation, engagement, and personal accountability. Reducing stress for self, others, and function.
2. **Collaboration:** Developing skills which allow for interactions to be healthy and positive, supporting HCWW strategy and customer service orientation.
3. **Change Management:** The role of each of person in creating a positive, empathetic culture that is future focused. People relationship centric with a team delivery mind set.
4. **Crisis Management and Problem Solving:** Applying a range of creative thinking styles and innovation to HCWW challenges and problems.
5. **Strategic Thinking:** Directs effort to achieve long-term business objectives.
6. **Commercial Thinking:** Ability to provide commercial prospects to meet customer expectations and business interests.
7. **Decision Making:** Uses sound judgment to make timely and effective decisions. Taking action to address barriers and opportunities through conducting logical, factual and reasoned analysis. Weighing different options to make sound judgment before deciding on an appropriate course of action and then taking it.
8. **Developing People:** Taking action to address problems, barriers and opportunities through conducting logical, factual and reasoned analysis. Weighing different options to make sound judgment before deciding on an appropriate course of action and then taking it.

The following tasks shall be performed by the Contractor:

Phase 1: Preparation and Internal Documentation Review

- Conduct a dialogue with the HCWW top management so as to align themselves to the HCWW competency framework and other project related requirements.
- Prepare guidance notes, identify documents requirements, and review the project relevant documentation.
- Hold one-to-one interviews with HCWW Leadership Team, and department heads (around 50 interviewees) to compile preliminary responses to the questions, directions, strategic vision, future leader qualities, traits, culture, environment and statements posed by the HCWW leadership.
- Review and reaffirm the HCWW competency framework inclusive of proficiency levels considering all facets of their interviews, and understanding of HCWW leadership direction, and project team.

Phase 2: Assessment of potential candidates

- Conduct personality psychometric assessments to assess the leadership skill sets and predominant traits of the pre-selected 150 potential leaders against the HCWW leadership competency framework and proficiency levels. This assessment shall be conducted at project outset, post successful completion of Phase “1” to select a shortlist of 120 potential leaders.
- Identify training needs, individual development plans leadership skill sets and predominant traits of the selected 120 potential leaders.

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Phase 3: Develop and conduct Leadership Training Program, second Psychometric and Exchange Program

- Develop 10 training modules for around 10 training weeks subject to GIZ-AV prior approval. Modules are to cover, but not limited to the following topics:
 - **Topic 1:** Public - Private Partnerships
 - **Topic 2:** Strategy and Organization Effectiveness
 - **Topic 3:** People Management and Competencies
 - **Topic 4:** Innovation and Continuous Improvement
 - **Topic 5:** Introduction to Finance and Accounting
 - **Topic 6:** Commercial Principals
 - **Topic 7:** Quality Management Standards and Egyptian Water & Wastewater Codes
 - **Topic 8:** Legislation Frameworks, Compliance and Governance
- The Contractor can provide more curriculums/topics for GIZ proposal evaluation team as deemed relevant.
- Conduct training sessions for the 120 participants on 4 training modules (average one week per module) using innovative learning methodologies, gamification, aids, role plays, aids, plans rather than mere traditional in-class visualized learning methodologies. Participants are to be split into 6 groups (20 pax per group), working in parallel or in a consecutive manner during the execution of each module in order to meet project timelines. Nevertheless, the Contractor can propose other alternatives.
- Conduct personality psychometric assessments based on pre-agreed assessment criteria to assess the leadership skill sets and predominant traits of the 120 potential leaders against the HCWW leadership competency framework and proficiency levels. This assessment shall be conducted post successful completion of the 4 training modules with the aim to identify the finalist 80 future leaders, fostering Diversity, Equity & Inclusion (DEI) philosophies during the systematic nomination process.
- Propose and conduct an **additional (second) differentiated assessment tool or technique** on the 120 potential leaders. This assessment shall be also conducted post successful completion of 4 training modules with the aim to identify the finalist 80 future leaders
- Develop **midterm phase report** inclusive of:
 - Assessment of Work in Progress during conducting the first 4 training modules.
 - 120 individual participant overall performance assessment and areas of development encompassing Contractor rationales to justify their feedback statements. The overall performance assessment comprises of both the Phase 2 Assessment (60%) and the cumulative instructor review of the participants performance in training up to module 4 (40%).
 - Rationale for the shortlisted finest 80 future leaders.

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- Areas of development, lessons learnt, areas of change amongst other criteria, for which the Contractor has noticed, and ways of incorporating these changes into upcoming phases.

The draft report shall be provided to GIZ and reviewed according to comments provided.

- Conduct training sessions for the shortlisted 80 future leaders on the remaining 6 modules using innovative learning methods. Participants are to be split into 4 groups (20 pax per group), working in parallel or in a consecutive manner during the execution of each module in order to meet project timelines. Nevertheless, the Contractor can propose other alternatives.
- Concurrently propose and conduct up to 6 additional “innovative” leadership engagement exchange platforms for the 80 future leaders to enable them conduct work in a harmonized manner. This shall focus on the finalist 80 future leaders and designed and conducted at a place of choice by the Contractor over a period of 6 months (4 groups (20 pax per group), 2 days per event for each group (i.e. total number of days: 4 groups * 2 days/event * 6 months = 48 days).
- Develop **final phase report** inclusive of:
 - Assessment of Work in Progress during conducting the remaining 6 training modules.
 - 80 individual participant overall performance assessment and areas of development encompassing Contractor rationales to justify their feedback statements. The overall assessment comprises of Phase 2 Assessment: assessment centers (40%), cumulative instructor review of the participants performance during training from Module 1 through to 10 (20%) and Phase 3 Assessments (40%).
 - Areas of development, lessons learnt, areas of change amongst other criteria, for which the Contractor has noticed, and ways of incorporating these changes into upcoming phases.

The draft report shall be provided to GIZ and reviewed according to comments provided.

Phase 4: Train the Trainers

- Conduct one Train the Trainers session for which shall be designed for the HCWW project team members consisting of 1 group (20 pax) for five days.

Deliverables of the Contractor:

- D1: Reviewed HCWW competency framework and proficiency levels.
- D2: Detailed inception report in Arabic and English (max. 15 pages each).
- D3: Psychometric assessment electronic questionnaire in the Arabic language.
- D4: **Additional (second) assessment tool or technique** in the Arabic language.

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- D5: Report highlighting performance and areas of development, training needs, individual development plans leadership skill sets and predominant traits of the selected 120 potential leader reports in Arabic and English languages.
- D6: All training material for all modules in both Arabic and English language.
- D7: Brief report by trainer/moderator on the 120 participants highlighting promising performers in Arabic.
- D8: Midterm report as specified above
- D9: Detailed description of the proposed content/ideas for the innovative leadership engagement exchange platform.
- D10: Up to eight (8) innovative leadership engagement / team building events.
- D11: Final report as specified above
- D12: Presentation to GIZ and HCWW steering committee highlighting key findings as the shortlisted 80 HCWW future leaders via open discussions covering rationales as to “Why” such findings were derived and future coaching prospects and areas of development.

Guiding principles:

- Continuous know how and knowledge transfer / cascade to the HCWW project team.
- Meetings/workshops/events shall be conducted physically onsite, unless otherwise requested by GIZ.
- For all deliverables, the contractor is expected to work with the GIZ and HCWW on several rounds of reviews and revisions as needed, until the approval of the final deliverables.
- All deliverables shall be submitted in open-source format, on HCWW templates.
- All deliverables are of proprietary intellectual property of GIZ and HCWW.

2.4. Milestones

As shown in the following table specific milestones related to implementation of the measures described above should be determined by the Contractor.

Some of the milestones related to tasks of the Contractor including timing are specified in the table below. The Contractor is required to verify the milestones and the schedule in his technical proposal. Additional milestones related to key activities may be included in the technical proposal if considered necessary. Milestones shall be integrated in the preliminary work plan according to Section 3.4 below.

| Milestone | Schedule (# of weeks after commissioning) |
|------------------|---|
|------------------|---|

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| | |
|---|----|
| One-to-one interviews with HCWW Leadership Team (about 50 interviewees) | 4 |
| Review HCWW competency framework inclusive of proficiency levels | 4 |
| Personality psychometric assessments for 150 potential leaders | 8 |
| Identify training needs, individual development plans for 120 shortlist leaders | 8 |
| Second new assessment technique for 120 potential leaders | 10 |
| Eight (8) innovative leadership engagement exchange platform programmes | 12 |
| Conduct training for 120 participants using innovative learning methodologies | 24 |
| Prepare report highlighting 120 performance and areas of development | 28 |

3. Technical-methodological concept

In the conceptual design of the tender (technical-methodological approach, project management, if necessary other requirements), the tenderer is required to take specific objectives and requirements into consideration and describe them, as explained below.

In the tender, the tenderer is required to show *how* the specified targets and results are to be achieved with the work packages in the tender (see section 2). For this purpose, the tenderer should consider the following five factors: strategy, cooperation, steering structure, processes and learning and innovation (sections 3.1 to 3.5). In addition, the tenderer must describe the design of the project management system in the narrower sense (section 3.6). The tenderer should avoid repeating information from existing documents. The restrictions on the number of pages given in section 6 of these ToRs must be followed.

3.1. Strategy (section 1.1 of the assessment grid)

The tenderer is required to interpret the targets that it is responsible for and provide a critical interpretation of the objectives and tasks (section 1.1.1 of the assessment grid). Subsequently, the tenderer must describe and justify the strategy they intend to use to achieve the deliverables, milestones, targets and results that it is responsible for (see section 2) by means of the work package described in section 2 (section 1.1.2 of the assessment grid). The tenderer should avoid repeating information from the description of the implementation approach (see section 3.6).

The strategy of the Contractor shall further explain how gender equality and related aspects are addressed and integrated in the specific activities under its area of responsibility (1.1.2 of the assessment grid).

Suggested number of pages: 4

3.2. Cooperation (section 1.2 of the assessment grid)

The tenderer must describe the relevant actors (partners and others) for the service in the tender and the interaction between relevant actors (section 1.2.1 of the assessment grid). The tenderer is required to develop a concept that shows how the cooperation with these actors is

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to be established and put into practice (section 1.2.2 of the assessment grid). The project's cooperation arrangements referred to in section 1 must be taken into consideration.

Suggested number of pages: 1

3.3. Steering structure (section 1.3 of the assessment grid)

The tenderer is required to describe and explain the approach and procedure for steering the measures with project partners involved in delivering the services set out in the tender (section 1.3.1 of the assessment grid).

The contractor plays an active role in the results-based monitoring of the project. The tenderer is therefore required to describe how it will monitor the results in its area of responsibility (section 2) in a way that corresponds with the client's expectations and specifications. The Contractor must also describe the related challenges (section 1.3.2 of the assessment grid).

Suggested number of pages: 1

3.4. Processes (section 1.4 of the assessment grid)

The tenderer is required to present and explain the preliminary work plan including work steps, milestones, and the schedule relevant to the services in the tender (section 1.4.1 of the assessment grid). In addition, a presentation and explanation of the integration of partner contributions shall be provided (section 1.4.2. of the assessment grid).

Suggested number of pages: 4 including the preliminary work plan

3.5. Learning and innovation (section 1.5 of the assessment grid)

The tenderer is required to describe its contribution to knowledge management in the project and at GIZ (section 1.5.1 of the assessment grid).

In addition, the tenderer is required to present and explain measures that promote horizontal or vertical scaling-up (section 1.5.2 of the assessment grid).

Suggested number of pages: 1/2

3.6. Contractor's project management activities (section 1.6 of the assessment grid)

In its tender, the tenderer is required to describe its approach and procedure for coordination with the overall project and the GIZ project team (section 1.6.1 of the assessment grid).

The tenderer is required to draw up and explain a personnel assignment plan for all experts included in its tender, for implementing the strategy described in section 3.1. The assignment plan should be linked to the preliminary work plan (see 3.4 above) and must include the assignment times (periods, expert days, work steps) (section 1.6.2 of the assessment grid).

The tenderer is required to describe its backstopping concept. A brief CV with relevant details must be provided for the position of backstopper. (Section 1.6.3 of the assessment grid).

The following services are part of the standard backstopping package and must be factored into the fees for the staff listed in the tender as ancillary staff costs in accordance with GIZ-Egypt's General Terms of Contract:

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- Process-based technical-conceptual management of the consultancy inputs
- Managing adaptations to changing conditions
- Monitoring performance
- Ensuring compliance with reporting requirements
- Sharing and making local use of the lessons learned by the contractor

Project management specifications:

- The contractor is responsible for selecting, preparing, training and steering the experts assigned to perform the consultancy tasks.
- The contractor will manage expenditures and costs, accounting processes and invoicing in accordance with GIZ’s requirements.
- The contractor submits the following reports:

| Report | Language | Schedule |
|--|--------------------------------------|---|
| Inception Report with final work plan | English (max. 15 pages plus annexes) | 1 month after commissioning of the assignment |
| Progress Reports incl. personal assignment | English (max. 15 pages plus annexes) | Every three months |
| Final Report | English (max. 30 pages plus annexes) | Draft 2 weeks before end of contract period |

- After a preparatory period of about one month, the Contractor shall prepare the final work plan for activities jointly with the GIZ team. The work plan shall be subject to approval of the GIZ-AV.
- Within the first 6 weeks after commissioning the assignment, a joint kick off workshop with the GIZ project management and local and regional partners shall be arranged by the Contractor.
- Progress reports shall be submitted every three months, including activities performed, the assignment of experts, the documentation of progress against the planned activities, and constraints during implementation and actions undertaken to overcome constraints. The reporting template shall be finalized jointly by GIZ and the Contractor.
- The draft version of the final report shall be submitted in the last month of the contract based on the format of GIZ progress reports.

Suggested number of pages: 2 plus CVs of the back stoppers in Annex.

3.7. Sustainability requirements (section 1.7 of the assessment grid)

The tenderer is required to demonstrate how it will ensure that the project activities are sustainable and how it will implement them in a way that avoids or reduces unintended negative results and promotes gender equality.

The tender is required to outline the key possible unintended negative results in its area of responsibility such as human rights and gender equality.

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3.8. Further requirements (section 1.8 of the assessment grid)

– Not applicable –

4. Human resources

4.1. General requirements

The Contractor shall be responsible for technical and administrative coordination of the tasks described above. He shall coordinate the assignment of all long- and short-term experts and ensure adequate logistical support as well as appropriate mission preparation.

The HCWW is the owner and beneficiary of the services provided by the Consultant and supports it by providing required information, expertise, and relevant contacts. HCWW shall be the entry gate for all contacts with the ACs and liaises with them. HCWW therefore plays a key and pivotal role during the implementation of the consultancy

GIZ-NDWM is the employer of the consultancy contract and provides guidance to the Contractor. GIZ facilitates the work through contacts and logistical support.

For assignments of short-term experts, the Contractor shall prepare terms of reference including the scope of work and activities for each assignment. Based on this ToR, the assignments of short-term specialists shall be subject to approval by the GIZ-AV or her/his assigned representatives. After completion of specific project interventions with short term specialists, a short report in English including deliverables related to the ToR shall be submitted to the GIZ-AV.

In addition to their specialist qualifications, all team members should also have the following qualifications (not part of the technical evaluation):

- Team skills with specific experience in leadership programs.
- Initiative.
- Communication skills.
- Social and intercultural skills.
- Efficient partner- and client-focused working methods.

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

4.2. Specified human resources concept

The tenderer is required to provide staff for the positions ('experts') referred to and described here in terms of the scope of tasks and qualifications on the basis of corresponding CVs (see section 6).

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Expert 1 and Expert 2 (i.e., both experts in pool 1) shall be considered as “key experts”. A statement of availability for all key experts must be attached to the tender as an annex.

Expert 1: Team Leader (section 2.1 of the assessment grid)

Tasks of Expert 1:

- Overall responsibility for the Contractor advisory services
- Ensuring the coherence and complementarity of the services of the Contractor in close coordination with the GIZ Head of Programme
- Management of the project team of the Contractor, including the assignment of short-term experts within approved project budget and timelines
- Responsibility for controlling the use of project related funds and financial planning in consultation with GIZ-AV
- Timely allocation of Consultants and Analysts on assigned project modules
- Report issues related to the assignment to the GIZ-AV and support in updating/adapting the project strategy, in evaluations and in preparing a potential follow-on phase
- Enhance project deliverables, approaches and provide through quality assurance
- Monthly review of project performance as related to assigned consultants and analysts and project status with GIZ-AV

Qualifications of Expert 1:

- Education/training (2.1.1): University degree (bachelor’s/master’s) in Engineering, Business, or Economics
- Languages (2.1.2): Proficient language skills in English (level C1 according to Common European Framework of Reference for Languages) (5 out of 10 points in assessment) and Arabic (level C2 according to Common European Framework of Reference for Languages) (remaining 5 out of 10 points in assessment)
- General professional experience (2.1.3): 12 years of professional experience in the management consulting sector
- Specific professional experience (2.1.4): 10 years of professional experience in multifaceted leadership development programs inclusive of Psychometric Assessments or Assessment Centers, or Leadership & Talent Development Trainings programmes
- Leadership/management experience (2.1.5): 10 years of management/leadership experience as a project team leader or manager in a local, regional or multinational reputed company
- Regional experience (2.1.6): 5 years of experience in projects in Egypt (5 out of 10 points), 5 years of related work experience outside Egypt (remaining 5 out of 10 points).
- Development cooperation (DC) experience (2.1.7): 3 years of experience in development cooperation context.
- Other (2.1.8): not relevant

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Expert 2: Expert pool 1 “Assessment Consultant” (Section 2.2 of the assessment grid)
2 experts with relevant profiles to tasks specified below.

Tasks of Expert 2:

- Deliver on assigned project details meticulously as related to the approved assessment tools by GIZ-AV
- Master, utilize and further enhance project related proprietary material.
- Maintain an internal healthy environment with the Analysts and HCWW program participants.
- Adhere and comply to GIZ-AV and Team Leader project related adhoc requests
- Monthly review of project performance and analyst contribution on execution of project modules

Qualifications of Expert 2.

- Education/training (2.2.1): University degree (bachelor’s/master’s) in Engineering, Business, or Economics
- Languages (2.2.2): Proficient language skills in English (level C1 according to Common European Framework of Reference for Languages) (5 out of 10 points in assessment) and Arabic (level C2 according to Common European Framework of Reference for Languages) (remaining 5 out of 10 points in assessment)
- General professional experience (2.2.3): 3 years of professional experience in multifaceted leadership development programs
- Specific professional experience (2.2.4): 5 years of professional experience in the management consulting executing multifaceted leadership development programs inclusive of Psychometric Assessments, or Assessment Centers, or Leadership & Talent Development Trainings programmes
- Leadership/management experience (2.2.5): 1 year of management/leadership experience as project team leader or manager in a management consultancy.
- Regional experience (2.2.6): 3 years of experience in projects in Egypt (5 out of 10 points), 2 years of related work experience outside Egypt (remaining 5 out of 10 points).
- Development cooperation (DC) experience (2.2.7): Not relevant
- Other (2.2.8): Not relevant

Expert 3: Expert pool 2 “Analysts” (Section 2.3 of the assessment grid)
2 experts with relevant profiles to tasks specified below.

Tasks of Expert 3:

- Assist in delivering project milestones, and preparation of client presentation material as related to the assessments, training programs and innovative team building event/s.
- Conduct in depth project-based research and meticulous reports.
- Assist in developing state of the art project deliverables
- Utilize and enhance further project related proprietary material.
- Assist in setting all project related requirements for running modules or trainings as per project timelines
- Assist in being a resourceful value addition to all project written deliverables

Subject of the tender procedure:**Transaction number:**Qualifications of Expert 3:

- Education/training (2.3.1): University degree (bachelor's/master's) in Engineering, Business, or Economics
- Languages (2.3.2): Proficient language skills in English (level C1 according to Common European Framework of Reference for Languages) (5 out of 10 points in assessment) and Arabic (level C2 according to Common European Framework of Reference for Languages) (remaining 5 out of 10 points in assessment)
- General professional experience (2.3.3): 1 year of professional experience in the management consulting
- Specific professional experience (2.3.4): 1 year of professional experience in multifaceted leadership development programs
- Leadership/management experience (2.3.5): Not relevant
- Regional experience (2.3.6): Not relevant
- Development cooperation (DC) experience (2.3.7): Not relevant
- Other (2.3.8): Not relevant

The tenderer must provide a clear overview of all the proposed experts (1) through (3) and their individual qualifications.

In addition, a **pool of additional national short-term experts** to supplement the expertise of the above experts will be required as specified below. The additional expert pool shall be nominated by the consultant on demand after the award of the contract and will **not be considered in the technical assessment** (i.e. submission of CVs is not required for the tender). Additional experts shall be recruited by the Contractor according to requirements after commissioning of the assignment. Suitable candidates (incl. CVs) shall be proposed by the Contractor to the GIZ-AV for approval (E-Mail communication with CVs attached and justification of assignment). The GIZ-AV shall be entitled to request for interviews with personnel proposed by the Contractor. Candidates may be rejected by the GIZ-AV in case they do not meet requirements. This procedure shall be subject to a transparent recruitment process of both parties. In case a candidate would be rejected the Contractor shall be required to suggest an alternative candidate within two weeks.

Additional pool of 'training consultants'

Minimum 10 and up to 20 experts with different profiles to supplement the expertise of the aforementioned experts. Potential tasks of the additional pool of training consultants include:

- Deliver project milestones, as related to each training module.
- Conduct meticulous reports on participants of each module.
- Be a resourceful value addition to all project written deliverables.

Qualifications for all experts of the additional pool of training consultants

- Education/training: all experts with a university degree in respective subject(s) to cover the tasks specified above.

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- Language: all experts with proficient language skills in English (level C1 according to Common European Framework of Reference for Languages) and Arabic (level C2 according to Common European Framework of Reference for Languages)
- General professional experience: all experts with 5 years of professional experience in conducting trainings to senior leaders.
- Specific professional experience: all experts with 5 years of professional experience in leadership development programs and within the allocated training module.
- Leadership/management experience: not relevant.
- Regional experience: not relevant
- Development cooperation (DC) experience: not relevant
- Other: not relevant.

Note: Additional training consultants are not considered in the technical assessment of bids.

5. Costing requirements

5.1. Assignment of experts

In your tender, please do not deviate from the specification of quantities required in these ToRs (the number of experts and expert days, the budget specified in the price schedule), because this is part of the competitive tender and is used to ensure that the tenders can be compared objectively. There is no entitlement to use the total number of expert days or the specified budget.

The proposed composition of the team of the Contractor and the estimated level of effort for experts is summarized in the table below.

Please note that these expert-days are already prefilled in the template to the price sheet.

| Expert | Expert days in home office | Expert days in country of assignment | Expert days in total | Consecutive stay > 3 months | Number of international flights | Number of national flights |
|---|----------------------------|--------------------------------------|----------------------|-----------------------------|---------------------------------|----------------------------|
| Expert 1: Team leader | 0 | 55 | 55 | NA | 0 | 1 |
| Expert 2: 2 Assessment Consultants | 0 | 280 | 280 | NA | 0 | 1 |
| Expert 3: 2 Analysts | 0 | 480 | 480 | N/A | 0 | 1 |

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| | | | | | | |
|--|---|-----|-----|-----|---|---|
| Additional pool: Training Consultants | 0 | 288 | 288 | N/A | 0 | 3 |
|--|---|-----|-----|-----|---|---|

Note: The number of expert days correspond to the working days. An expert-day is a full day on which the contractor or one or more of the experts it assigns provides work and services for GIZ. Days used exclusively for travel are not considered to be expert-days.

5.2 Local administrative staff

– Not applicable –

5.3 Travel expenses

The travel expenses must be costed as follows by the contractor:

| Travel expenses item | Number/quantity |
|--|--|
| Regional/national flights | Lump sum EGP 3,870.- per roundtrip |
| Local transport costs | EGP 9,300.- per month |
| Per-diem allowances | EGP 350.- per day |
| Accommodation allowances | EGP 1,300.- per day |
| Other travel expenses (transport from/to airport for national flights) | EGP 560.- per airport transportation for national flight |

The costs are reimbursed as a lump sum. All business travel must be agreed in advance by the officer responsible for the project. Travel expenses must be kept as low as possible.

Duty related transport within Egypt shall be arranged by the Contractor. Public transport, taxis or car rental shall be considered. No project vehicle will be provided by GIZ for local transport.

5.4. Equipment

– Not applicable –

5.5. Operating costs in the country of assignment

– Not applicable –

5.6. Workshops, education and training

In addition, a budget of total up to **EGP 1,414,000.-** shall be included in the financial proposal for procurement of training material as well as for moderation and translation (if required). The fixed, unalterable budget given above is specified in the price schedule for costs related to workshops.

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The budget does not include the fees and travel expenses for the contractor's experts incurred in connection with the planning and running of the workshops. These are covered by the corresponding number of expert days and travel expenses (sections 5.4 to 5.7 and 5.9 of the financial bid).

Other costs related to workshops and trainings will be covered through the GIZ (i.e. room hire, technical systems, catering, as well as local transport and accommodation for participants).

It is estimated that 73 workshops/event will be required to implement the training activities. A summary of workshop-related deliverables is in the table below.

| Training or Workshop | Suggested number of rounds | Suggested duration per round | Expected number of participants per round | Expected audience | Language |
|---|----------------------------|------------------------------|---|-------------------|--------------------|
| Leadership training workshops | 48 | 5 days | 20 | Potential leaders | Arabic and English |
| Innovative leadership engagement / team building events | 24 | 2 days | 20 | Potential leaders | Arabic and English |
| ToT training | 1 | 5 days | 20 | | |

5.7. Local subsidies

– Not applicable –

5.8. Other costs

– Not applicable –

5.9. Flexible remuneration item

Budget for flexible remuneration: **EGP 387,000.-**

The fixed, unalterable budget given above is earmarked in the price schedule for flexible remuneration. Flexible remuneration is intended to facilitate the flexible management of the contract by the officer responsible for the commission at GIZ. Use of the flexible remuneration item must be approved by GIZ in writing before the costs in question are incurred.

6. Requirements on the format of the tender

The structure of the tender must correspond with the structure of the ToRs. It must be legible (font size 11 or larger) and clearly formulated. The language of the tender is English.

The technical-methodological concept of the tender (section 3 of the ToRs) is not to exceed 14 pages (not including the cover page, list of abbreviations, table of contents and brief

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introduction). Subchapters should not exceed the number of pages specified in Chapter 3 above.

The CVs of the staff proposed in accordance with section 4 of the ToRs must be in the EU-format and must not be more than 4 pages in length. The CVs must clearly show what position the proposed person held, which tasks they performed and how many expert days they worked during which period in the specified references. The CVs can also be submitted in English.

We strongly request that you do not exceed the number of pages specified.

Only technical bids of bidders fulfilling the commercial and technical eligibility criteria will be evaluated.

7. Options

7.1 Follow-on measure/extension of service-delivery period

It is possible to continue key elements of the service specified in the tender as part of a follow-on measure within the context of the basic project. This is described in detail below.

Type and scope: GIZ shall be entitled to extend the period for fulfilment of the original contract by unilaterally notifying the Contractor and allowing a reasonable amount of time. The quantitative requirements are adjusted accordingly taking into account any unused items and budgets. In addition, the fees may be adjusted in accordance with the price adjustment clause provided for in the applicable General Terms and Conditions of Contract. All other provisions of the contract and its annexes shall remain unchanged. Notification must be given in text form.

7.2 Expansion of the service content

GIZ's commissioning party may adapt the service in the tender within the context of a change to the contract for the basic project. This is described in detail below.

Type and scope: GIZ shall be entitled to extend the scope of services in the original contract by unilaterally notifying the Contractor as laid down in the Terms of Reference and allowing a reasonable amount of time for the respective extension. The quantitative requirements are adjusted accordingly taking into account any unused items and budgets. In addition, the fees may be adjusted in accordance with the price adjustment clause provided for in the applicable General Terms and Conditions of Contract. All other provisions of the contract and its annexes shall remain unchanged. Notification must be given in text form.

8. Annexes

1. Bidding Conditions (local)
2. Specifications (TOR)
3. General Conditions of Contracts (January 2017)

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4. Eligibility Assessment grid
5. Assessment Grid for the Technical Evaluation of Bids
6. Budget template
7. GIZ Project Proposal to BMZ
8. Results Matrix for the GIZ project
9. Stakeholder's Map