

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

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|---|------------------------------------|
| <b>PROPOSALS FOR DEVELOPING SELECTED COMMUNITIES BASED ON THEIR CULTURAL HERITAGE</b> | <b>Project number cost centre:</b> |
|   | <b>19.2204.6-013/3900</b>          |

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**1. Context**

**Background**

Georgia’s [Pilot Integrated Regional Development Programme \(PIRDP\)](#) is a national initiative that addresses the social and economic territorial imbalance between the capital, Tbilisi, (and to a lesser extent Batumi), and the rest of the country. Targeting the 4 regions of Guria, Imereti, Kakheti, and Racha, Lechkhumi and Kvemo Svaneti, it is supported by the EU under its 2019 programme “[EU4 Integrated Territorial Development](#)” (**EU4ITD**) to the tune of 54 MEUR. Of this amount, 40 MEUR in budget support, together with 10 MEUR from the national budget, has been channelled to **1)** municipal investment projects via the [Ministry for Regional Development and Infrastructure \(MRDI\)](#) and, to a lesser extent, **2)** individual entrepreneurs and micro-/small-enterprises via [Enterprise Georgia](#) and the [Georgian Innovation and Technology Agency \(GITA\)](#), both under the Ministry of Economy and Sustainable Development), as well as the [Rural Development Agency \(RDA\)](#) under the Ministry of Environmental Protection and Agriculture. In addition to these projects, mostly completed by the end of 2022, EU4ITD also funds a number of complementary measures, including a grant scheme for municipalities (2.5 MEUR), technical assistance (2.25 MEUR), and 2 Contribution Agreements,<sup>1</sup> the first with UNDP (2 MEUR, “EU4ITD: Advancing decentralized, effective, and inclusive governance in Georgia”), and the second with GIZ (outlined in the next paragraph).

“**EU4ITD - Catalysing Economic and Social Life in PIRDP Regions**” (CESL) is implemented under the wider GIZ regional programme “[Good Governance for Local Development South](#)”

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<sup>1</sup> Under Contribution Agreements, the EU entrusts project implementation to international or Member State organisations which it has assessed as fulfilling criteria related to managing of public finances.

Caucasus” and has a total budget of 7.5 MEUR (6.5 from the EU and 1 from the German government); it runs from 28 January 2022 to 27 September 2025. It addresses on one hand municipalities (including financing of urban renewal, tourism development, and economic activation/income generation projects), and on the other individual entrepreneurs and micro-enterprises (to stimulate income generation and economically activate “hard-to-reach” target groups). Interventions are limited to the 4 PIRDP regions, while they should, in principle, also be “integrated” in nature.<sup>2</sup> Given the project’s scope, stakeholders are varied and numerous at both central, regional, and local level; of particular note are the MRDI (the ministry responsible for the PIRDP and therefore the project team’s prime interlocutor), the Governor’s Offices in each of the 4 regions, and the 27 constituent municipalities. The implementing team’s front office comprises 5 staff based in Tbilisi, 2 in Kutaisi (covering Guria, Imereti, and Racha) and 1 in Telavi (for Kakheti).

Working towards regions/municipalities which are economically, socially, and environmentally healthy is a core aim of CESL. This would result in fewer people leaving for the capital (e.g. for work) and should also encourage some to move in the opposite direction. Thus, under its **urban renewal** component, CESL seeks to identify potential within, for example, post industrial towns, on which development can be built (e.g. culturally significant buildings erected during the early Soviet period or before, nearby sites of natural interest/heritage, evidence of young people’s dedication to their communities). A similar approach is taken under the **tourism development** and **economic activation/income generation** strands, though here the focus tends to be more on rural locales.

## Rationale

In line with its remit, CESL seeks to catalyse the potential in the regions of Georgia. One way of doing this is to **1**) provide the communities concerned (including their decision-makers) with ideas for how to develop such potential (possibly informing future urban plans and public investments), and **2**) stimulate external interest in the community and its potential (possibly leading to an increase in investment or visitors). CESL pursues 1) and 2) in relation to the regions that it covers via a number of mechanisms, one of which comprises partnering with architectural faculties<sup>3</sup> of Georgian research and teaching institutes accredited by the Ministry of Education and Science of Georgia; they not only possess the relevant expertise, but also incorporate relevant research activities in their day-to-day work (e.g. as part of the regular curriculum for students).

## Objectives

- To provide selected communities (put forward by the contractor in his tender and agreed with CESL) - primarily the local public administration, but also other stakeholders from e.g. the private or civil society - with ideas for how to develop unrealised potential based on their cultural heritage.
- To stimulate external interest in the selected communities with regard to the same unrealised potential.

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<sup>2</sup> e.g. an initiative concerning urban renewal should be “place-based” (i.e. sensitive to the needs of a particular location) and multi-sectoral, involve different stakeholder groups (e.g. local administration, CSOs, businesses), combine hard and soft measures, and, ideally, bring together different levels of government

<sup>3</sup> In Georgia, only architectural faculties consider the issues in which CESL is interested in (e.g. how to develop a defined territory); for instance, urban planning does not exist as a separate discipline in tertiary education.

## 2. Tasks to be performed by the contractor

The contractor, a Georgian research and teaching institute accredited by the Ministry of Education and Science of Georgia (with implementation falling to its architectural faculty), is responsible for providing the services below for each of 3 sets of selected communities over 3 semesters (2 in 2024 and the first semester in 2025) - i.e. work each semester will concern 1 set of selected communities. Activities are to be an integrated part of the contractor's curriculum and to involve input by both faculty and students.

- Scoping/research visit, including meetings with relevant stakeholders
- Identification of cultural heritage (anticipated to usually comprise physical locations/buildings) with unrealised potential
- Conceptualisation of how selected cultural heritage could be developed
- Drafting designs for development of selected cultural heritage, including model construction
- Presentation to stakeholders, most likely involving an exhibition in the selected locations
- Exhibition in Tbilisi
- Report on the above, including how it was conducted, results, and any "lessons learned".

A final report is also to be submitted by the contractor at the end of the assignment.

Given that materials for public circulation will be produced (and exhibited) under the contract, it is important that they respect the mandatory **communication and visibility** conditions applicable to CESL (due to the fact it is funded by the EU and the German government). Such conditions are thus inherited by contractor, and their fulfilment shall be overseen by the CESL staff.

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

| <b>Milestones/process steps/partial services</b>   | <b>Deadline/place/person responsible</b>                 |
|--|--|
| <b>1) a)</b> Presentation to stakeholders of the work conducted in relation to the set of communities selected for the spring semester of 2024, and <b>b)</b> submission by the contractor and approval by GIZ of the report on work conducted during the spring semester of 2024  | July 2024, place tbd, contractor and GIZ responsible     |
| <b>2) a)</b> Presentation to stakeholders of the work conducted in relation to the set of communities selected for the autumn semester of 2024, and <b>b)</b> submission by the contractor and approval by GIZ of the report on work conducted during the autumn semester of 2024  | December 2024, place tbd, contractor and GIZ responsible |
| <b>3) a)</b> Presentation to stakeholders of the work conducted in relation to the set of communities selected for the spring semester of 2025, <b>b)</b> Submission by the contractor and approval by GIZ of the report on work conducted during the autumn semester of 2025, and <b>c)</b> Submission by the contractor and approval by GIZ of the final report on work conducted over the contract's lifetime | July 2025, place tbd, contractor and GIZ responsible     |

Period of assignment: from 19 February 2024 until 31 July 2025.

## 3. Concept

In the tender, the tenderer is required to set out its "technical-methodological concept", which responds to the objectives in Chapter 1 and the tasks in Chapter 2 – concretely, **how** they are

to be achieved/performed. 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**

This concept should:

- **(1.1.2)** Describe and justify the strategy for delivering the services put out to tender (including achieving the objectives in Chapter 1 and performing the tasks in Chapter 2). Notably, tenderers should **1)** propose here the 3 sets of selected communities to be addressed in each of the 3 semesters,<sup>4</sup> this to be accompanied with an explanation of why they are chosen and not others; and **2)** describe how tasks in Chapter 2 will be integrated into the regular curriculum.
- **(1.2.2)** Outline how relevant stakeholders in the selected communities (e.g. public administration, local youth) will be identified and subsequently involved in the performance of tasks.
- **(1.4.1)** Set out an indicative plan for implementation, covering individual steps to be taken, milestones, and schedule.
- **(1.5.1)** Explain how contract implementation involves and/or will result in an increase in knowledge on the part of CESL and stakeholders

### **Project management of the contractor (1.6)**

Given that the tasks in Chapter 2 are to be integrated in the day-to-day work of the contractor, and therefore performed by its in-house staff and student faculty, relevant information should be included in tenders to show that the tenderer:

- Is able to mobilise appropriate faculty and students for the performance of the assignment
- Mobilised faculty can ensure fluent communication in both English and Georgian

To this end, the tenderer is required to outline a “personnel assignment plan” indicating which staff members will be working on which tasks for which periods; an abbreviated description of staff members’ qualifications and experience should also be included (including their linguistic capacities). This plan should also indicate which class(es) will indicatively work on the tasks in Chapter 2 above, with an estimate of the number of students anticipated per class per semester.

### **Experience of the company/organisation (3)**

Experience of tenderers relevant to this terms of reference should be set out in their bids. Of particular interest are the following issues – these **must** be covered in the tender;

- The tenderer’s accreditation by the Ministry of Education and Science of Georgia as a research and teaching institute;
- Information on the tenderer’s architectural faculty;
- A tenderer’s specific research and/or pedagogical programmes dedicated to Georgian regions outside Tbilisi;
- Previous and/or current work/assignments/activities conducted by the tenderer of a similar nature, with an indication of **what** they concerned, **where** they were performed, **when** they were conducted, and **how** much they cost;

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<sup>4</sup> Note that “a set of communities” does not imply more than one community – a “set” can simply comprise a single community.

- Average annual turn over for the last three financial years, at least: **500,000 Euro**;
- Average number of employees and managers for the past three calendar year, at list: **100 persons**;
- Development based on local/regional heritage reference projects in the last three calendar year, at list: **2**;

#### 4. Personnel concept

No personnel concept is required for this tender, since staff of the contractor involved in implementation will not be remunerated under the contract. Activities are integrated into the day-to-day work of the contractor and the necessary input from staff is therefore automatically covered under their existing (and prior) contractual relations with the contractor.

#### 5. Costing requirements

The following costs will be covered under the contract:

- Travel for faculty and students to the communities selected as subject of the tasks in Chapter 2
- Overnight accommodation for faculty and students when travelling to the selected communities
- Purchase of materials necessary for modelling and exhibition purposes

Specification of inputs is as indicated in the table below

| Travel expenses                                     | Quantity        | Comments   |
|---|-----------------|--|
| <b>Overnight allowance in country of assignment</b> | <b>Lump sum</b> | Overnight accommodation for faculty and students (max 36 people assumed – e.g. 4 faculty, 32 students) during 1 scoping/research visit (2 overnights assumed) and 1 presentation to stakeholders (1 overnight assumed) for each of 3 semesters. Since it is assumed that rooms will be shared by 2 people, it is estimated that implementation will require 162 overnight rooms (36 people x 3 overnights x 3 semesters / 2 people per room = 162) |
| Transport   | Quantity        | Comments   |
| <b>Fixed travel budget</b>                          | <b>Lump sum</b> | Return trip by bus for faculty and students for 1 scoping/research visits and 1 presentation to stakeholders for each of 3 semesters (therefore 6 trips in total)  |
| Other costs   | Number          | Comments   |
| <b>Procurement of materials and equipment</b>       | <b>Lump sum</b> | Procurement of materials necessary for the performance of the tasks in Chapter 2 – e.g. materials to be printed (e.g. 50 x A5 booklets and 100 A1 designs for 1 presentation/exhibition for each of the 3 semesters) or necessary for the production   |

|  |  |   |
|--|--|---|
|  |  | of models/maquettes of locations/sites to show how they might be developed (a maximum of 32 small models and 1 large model is estimated per semester – therefore 96 small and 3 large in total) |
|--|--|---|

## 6. Inputs of GIZ or other actors

No inputs are foreseen on the part of GIZ or other actors

## 7. Requirements on the format and the documentation of the tender

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

The complete tender must not exceed 10 pages. External content (e.g. links to websites) will not be considered.

In addition the tender should be accompanied by the following documents, which are not included in the maximum of 10 pages :

- A document proving that the tenderer is accredited by the Ministry of Education and Science of Georgia as a research and teaching institute.
- A concise summary/presentation about the architectural faculty of the tenderer.
- A concise summary/presentation by the tenderer outlining their research and/or teaching programs focused on Georgian regions beyond Tbilisi.
- Presentation of previous and/or current work/assignments/activities of a similar nature, with an indication of **what** they concerned, **where** they were performed, **when** they were conducted, and **how** much they cost;

Please calculate your financial tender based exactly on the parameters specified in Chapter 5. The specifications for pricing are defined in the price schedule.