

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

Local Advisory Services on Energy Efficiency Management System for Georgian municipalities.

**Project number/
cost centre:
21.2140.8-001.00**

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0. List of abbreviations

AG	Commissioning party
AN	Contractor
AVB	General Terms and Conditions of Contract for supplying services and work
EMDB	Energy Management Dashboard for Municipalities
EMS	Energy Efficiency Management
FK	Expert
FKT	Expert days
KZFK	Short-term expert
LEN	Learning Energy Network
MoESD	Ministry of Economy and Sustainable Development
MRDI	Ministry for Regional Development and Infrastructure
ToRs	Terms of reference
MEPA	Ministry of Environmental Protection and Agriculture
CCODMS	Climate Change Online Data Management System
MaVP	Monitoring and Verification Platform
CWIE	Collaboration with International Expert

1. Context

Background on the project:

The “Sustainable Urban Development in Georgia” project (SUD) is funded by the German Federal Ministry for Economic Cooperation and Development (BMZ) and implemented by GIZ in cooperation with several Georgian partners led by the Ministry for Regional Development and Infrastructure (MRDI). The project was launched in February 2023 and will continue until January 2027. The project will initially work in the urban areas of Batumi, Zugdidi, and Oni. It is intended to select 2 more cities during 2024.

The project brings integrated urban projects to readiness for financing in the fields of energy efficiency, mobility, waste management, sustainable tourism and public spaces. For this, the project works closely with selected cities in Georgia, in cooperation with national and sub-national actors, as well as a professional network of experts and the local communities. The project applies the “Urban laboratory” method, which strengthens urban integration and citizen participation and supports the development of Neighbourhood Development Plans (NDPs). Additionally, as part of enhancing municipalities' capacity in energy efficiency, the project develops and pilots a municipal energy management system. It also strengthens investment budgeting capacities in local governments. To summarize, the project's goal is to contribute to participatory, climate-friendly, gender-sensitive and integrated sustainable urban development in Georgian cities in line with the New Urban Agenda by increasing capacities of national and local governments to better implement climate-relevant strategies in cooperation with private and civil society actors.

Moreover, the project supports the establishment of the national Urban Policy Innovation Group (UPIG), which is comprised of the Ministry of Environment Protection and Agriculture, the Ministry of Economy and Sustainable Development – MoESD (responsible for energy) and Sustainable Development and chaired by the MRDI. First, UPIG identifies the policies, sector technologies, planning and/or financing instruments to be tested within the Urban Labs alongside the local challenges. Then, it utilizes the insights generated by the Urban Labs to elaborate recommendations for climate-friendly urban development in Georgia.

Additionally, the experience generated through the Urban Labs is shared with local urban practitioners through a Network of Urban Innovators. The Network offers a platform to support knowledge exchange among urban professionals through the series of events as well as knowledge products (e.g., trainings, guidelines, publications, etc.) The platform will be created together with existing local networks and focus on the exchange among the local urban practitioners and thinkers.

Background on Energy Efficiency Management:

According to the Law on Energy Efficiency, the Government of Georgia shall ensure the annual refurbishment of 1% of the total usable area of a building, occupied by a public administrative body, which needs to be heated or cooled in order to achieve the minimum energy performance determined by the legislation of Georgia. These requirements shall apply to buildings occupied by an administrative body, the total usable floor area of which exceed 250 m².

One topic the project supports locally is energy efficiency in public buildings. Energy management is a systematic process of planning, monitoring, and optimizing the use of energy in an organization, such as an enterprise/company or a municipality. Energy

management can help reduce energy costs, improve energy security, and achieve CO₂ emissions reduction targets.

Municipalities are important energy consumers, as they are responsible for providing public services such as street lighting, public transportation, administrative services, water supply, waste management, etc. The infrastructure owned and managed by municipalities consume significant amounts of energy.

In addition, municipalities can influence the behaviour of citizens and/or steer businesses' market decisions in terms of energy consumption through awareness raising and regulation.

However, most municipalities lack the capacities, resources, and tools to implement energy efficiency and energy management practices. The challenges faced by the municipalities are mainly related to energy data availability/mapping, lack of technical skills and knowledge, and non-existence of a standardized process for energy management.

These challenges can be reduced by implementing an Energy Management System (EMS) in municipalities following the process below:

EMS enables municipalities to better gather and analyse energy data, allowing them to draft data-driven action plans, ensuring that the municipal energy policies are evidence-based. In addition, municipalities will be able to track energy performance and re-adjust/update their action plans based on new data gathered.

One of the most important tools necessary to implement an EMS is an EMS dashboard/software, allowing the energy teams in municipalities to record, analyse and track performance of energy data. Without such a tool, the energy teams generally only rely on less suitable software programs (such as excel sheets), which makes it hard to effectively track and visualize energy data and performance.

There are currently two active platforms with similar goals in Georgia: "Climate Change Online Data Management System" (CCODMS) hosted by MEPA and Monitoring and Verification Platform (MVP) hosted by MoESD.

CCODMS was implemented in 2020. Its goal was to facilitate the implementation of the two important processes: 1) Monitoring the implementation of the commitments under Georgia's Nationally Determined Contribution (NDC) by coordinating the execution of the Climate Action Plan (CAP) 2) Fulfilling the commitments undertaken by the Covenant of Mayors' (CoMCE) signatory municipalities by generating the Sustainable Energy and Climate Action Plan (SECAP) and monitoring reports.

During the implementation process of CCODMS programme, an electronic system was created hosted by MEPA and municipality staff were trained in data collection, data input and overall use of the system. Currently the (CCODMS) is not being utilized by any Georgian municipality. The software tool is still being hosted on MEPA website, the functionality and usability of the system is to be assessed regarding the requirements of the project.

The Monitoring and Verification Platform was implemented by MoESD in the beginning of 2024 with the goal to become the central database for implemented projects in the energy efficiency field. The main functions of the platform MVP are to register the new energy efficiency or CO₂ emission reduction action plan/program and to assign the implemented measure(s). The platform has been developed under EU4Energy programme by Energy Community and transferred to MoESD. The implementation of MVP is still in early stages

and due to IT restrictions municipalities cannot directly access the platform. To work around this, the MoESD sends questionnaires to the stakeholders; after being filled out, the information is then manually submitted to the platform.

Assignment overview:

The main objective of this assignment is the implementation of a sustainable EMS in 4 pilot municipalities in Georgia. In a second phase (outside the scope of this ToR), the EMS will eventually be deployed in the remaining 65 municipalities in Georgia.

The implementation of the EMS will start through the development of standard processes and tools that should guide the municipalities in defining their energy management policy, developing their action plan, making decisions and implementing measures, monitoring their progress, measuring the results and reviewing their policy. The EMS should use a continuous improvement approach and should take into consideration the available human and financial resources in Georgian municipalities. To ensure the sustainability of the approach, in addition to the external expertise brought in by the energy experts, the municipalities should also have trained human resources that will have the competence to present and defend energy efficiency measures in front of decision makers at local and regional level as well as initiate and follow up on the implementation of measures. This staff of local municipalities should be trained in line with Georgian national policies and legislation and provided with standard tools, guides, and training curriculum, that they should use in the process of implementing EMS, developing and reviewing their action plans. Thus, within the scope of this assignment, it is necessary to develop a job description for municipal energy managers, develop training materials, train municipal energy managers.

The project will support the local partners (local municipalities and ministries) in development, adaptation and implementation of an Energy Management Dashboard for Municipalities (EMDB) and provide needed capacity development for the personnel at central and municipal level. The starting point for identification of relevant tools should be the review of functionality of CCDMS, MVP and possibility of their adaptation for EMS.

The Energy Management Dashboard (EMDB) should be an open-source intranet application, that will allow the Georgian municipalities to systematically monitor the resource consumption (for example: electricity, gas, fuel, water etc) of the different asset units that they're managing for example (administrative buildings, schools, medical centres, sport centres, street lighting and their vehicle fleet). The tool should allow the reconstruction of consumption history (from the last three years), to identify anomalies in available energy consumption data, main consumption centres (including irregular and suspect consumptions, measurable e.g. in Georgian Lari, kWh, litres). The tool also should allow the monitoring of implemented energy efficiency measures and provide yearly reports on energy performance in the municipality.

The EMDB is a decision support tool for decision-makers and municipal officials in charge of municipal asset management. Through its support to municipal energy planning, this tool facilitates the definition of objectives in terms of energy consumption by type of assets. The tool should also provide an overview of municipal energy consumption for the national level by municipality and by region and allow central government institutions (especially MEPA) to have real time access to energy consumption (as soon as the information has been entered), for them to setting key energy performance indicators, and following up on the main energy efficiency measures and municipal energy expenditure share per consumption centre.

To achieve this output, the SUD project is announcing two procurement contracts: 1) For local field experts to support SUD's implementing partners in the development and implementation of an EMS and 2) For an international expert who will methodically support local consultants by international experience and expertise to support EMS component and SUD.

This Terms of Reference is for procurement #1: a group of local experts, who will cooperate with an international expert on tasks and references outlined below. The local team leader will lead the process, and an international expert will provide international expertise, both in close cooperation with the SUD project of GIZ.

2. Tasks to be performed by the contractor

The contractor is responsible for providing the following services (work packages - WP):

- WP 1: Development of an Energy Management System adapted to Georgian Municipalities
- WP 2: Development and implementation of a capacity building program on municipal EMS, including a Learning Energy Network (LEN) amongst the participating municipalities and a certification scheme
- WP 3: Supporting the development and implementation of an EMS data management platform (Energy Management Dashboard, EMDB) to be used in Georgian municipalities and by national government institutions
- WP 4: Development of an action plan for the roll-out of the EMS in all Georgian municipalities

A designation of CWIE ("Collaboration With International Expert") is added to the below activities where the cooperation between the two assignments (local and international experts) is required.

All activities mentioned below in the work packages can in some parts be subjects to change, depending on changing requirements of GIZ's partner institutions. Therefore, the service provider of this assignment will stay in close touch with the GIZ project SUD and also with the international expert, where required.

WORK PACKAGE 1: Development of an Energy Management System adapted to Georgian Municipalities

The municipal EMS is a set of procedures, processes and tools intended to provide the municipalities with a systematic approach to better manage their energy consumption and continuously improve their energy performances. It should define in a standardized way the main steps and different responsibilities within the municipality, from developing their policy for better energy use, setting their targets, establishing processes for data gathering and measuring results to reviewing the policy and continuous improvement.

As many Georgian municipalities do not have the human and financial resources to implement complex systems (i.e. ISO 50001), the EMS approach should be adapted to the existing resources, and provide the needed flexibility for local municipalities, using a minimum of their resources, however meeting nationally required standards.

As access to data is very important to better understand and make decisions about energy use, and to measure results and monitor impacts, an Energy Management Dashboard (EMDB) will be implemented as a tool supporting the EMS in parallel in WP 3.

A Learning Energy Network will be established together with the EMS.

The activities of WP1 include:

1. Kick-off meeting and/or virtual one-to-one meetings with the project partners, involved stakeholders and the pilot municipalities to agree on the requirements for the EMS tool and draw a concept for the implementation of a municipal EMS (including tasks to be done under WP2) (CWIE)
2. Conducting research assessing successes and shortcomings of CCODMS and MVP implementation, assessing their capacity and compatibility with project requirements, as well as needs of the end users - partner ministries and local authorities (CWIE)
3. Assessing local context through interviews with pilot local municipalities, analysing already available documentation by municipalities, MRDI and MEPA (including sample audit reports) (CWIE)
4. Development of the EMS approach - a set of procedures, processes and tools intended to provide the municipalities with a systematic approach to better manage their energy consumption and continuously improve their energy performances. (CWIE)
5. Supervision of formation of energy teams within partner municipalities
6. Mentorship of local energy managers whilst establishing and applying EMS in their municipality
7. Mentorship of local energy managers during development or revision of SECAPs, if requested by municipalities, and follow-up within the LEN.
8. Supporting municipalities in identification of the municipal investment project concepts in the field of energy efficiency to be further developed and/or implemented with the support of SUD.
9. Development of policy recommendations (mainly to MESD and MEPA) to support energy management and climate-oriented energy measures uptake in Georgia. (CWIE)
10. Participation in up to three policymaker group meetings including presentation of the EMS, related materials, and/or policy recommendations at the events, such as Urban Policy Innovation Group, Covenant of Mayors working group meeting of the National Climate Change Council of Georgia. The topic and the content of the presentations to be prior agreed with GIZ.

The development of tools must take into consideration the materials and software solutions that are already in place among Georgian stakeholders and must meet requirements/be in line with the legal framework of the MoESD and MEPA.

Milestones/process steps/partial services	Delivery deadline period
Assessment of the current picture in Georgia through meetings with relevant stakeholders	2 weeks after the beginning of the contract
Assessment of CCODMS and MVP compatibility with project requirements and best international practices	4 weeks after the beginning of the contract
Presentation of policy recommendations to the UPIG based on the above assessments	On the first meeting of UPIG after concept development
Formation of energy teams within municipalities	8 weeks after the beginning of the contract
Supporting/mentoring energy teams in applying EMS	On-going after the formation of the energy teams until the end of the assignment
Presenting the plan of further development to stakeholders	8 weeks after the beginning of the contract

Support municipalities in developing project concepts for future financing (4 municipalities, at least 1 project concept each, up to 5 concepts in total)	6 months after the beginning of the contract
Meetings with SUD energy advisor	twice a month

WORK PACKAGE 2 - Development and implementation of a capacity building program on municipal EMS, including LAN and certification scheme

The objective of **WP 2** is to develop and implement a **capacity building program**, including a **Learning Energy Network (LEN)**, a training program covering the topics of energy efficiency, renewable energy, and EMS in municipalities with a focus on public buildings and public facilities, and a relevant certification scheme.

The activities to be realized under this WP include:

1. Assessing the capacity needs of the local municipalities and existing training programs in Georgia (*CWIE*)
2. Establishing a **Learning Energy Network (LEN)**
3. Developing a training methodology and curricula suitable for implementation for Georgian municipalities (*CWIE*)
4. Developing a certification scheme for municipalities and energy managers and support the certification of 4 pilot municipalities
5. Developing training materials. The contractor shall propose what is envisioned in their technical-methodological proposal.
6. Conducting and moderating trainings for municipal staff of pilot municipalities.
7. Developing training materials for the rollout of EMS to all Georgian municipalities based on experience from pilot trainings.

For the delivery of this WP, the Contractor will be responsible for the development of a suitable training program to be implemented for Georgian municipalities. The contents of the training should be developed to target municipal staff and staff of national stakeholders. It should cover at least the following aspects:

- Renewable energy technologies suitable for municipal applications, including technical and commercial aspects
- Energy efficiency in municipalities
- Energy management and energy management systems, including using the EMS tool
- Development, implementation, and monitoring of municipal action plans, including identifying priority measures.
- Further aspects, if necessary

Development of a Learning Energy Network (LEN). A LEN is intended to be a peer learning platform for the representatives of the 4 participating pilot municipalities. Within moderated network meetings, the representatives have the opportunity to attend trainings, share their experiences regarding energy efficiency and renewable energy measures, different challenges they're facing. They also have access to experts' input on identified

topics through guest presenters, developing common activities and discuss their progress in their respective energy efficiency and renewable energy action plans.

The development of the LEN will include:

- Concept development for the Municipal LEN including
 - Main processes for implementation of EMS (Participants' selection, needs assessment approach, impact monitoring, sustainability, core activities, roles and responsibilities of each stakeholder)
 - A concept to involve civil society, research and private sector
- Support local partners in the organisation of the meetings
Provide expert inputs for network meetings (best available technologies, international experiences, analysis of monitoring reports etc .) and to other upcoming events (e.g. GIZ's Urban Innovators' Network)

Milestones for WP 2, as laid out in the table below, are to be achieved during the contract term:

Milestones/process steps/partial services	Delivery deadline period
Assessment report on capacity needs and existing training programs.	8 weeks after the beginning of the contract
Training methodology and curricula developed and agreed with the stakeholders	12 weeks after the beginning of the contract
Learning Energy Network established, and regularly facilitated	14 weeks after the beginning of the contract, then on-going
Training materials developed and agreed	6 months after the beginning of the contract
Pilot trainings programme conducted	10 months after the beginning of the contract.
Final version of materials and of the toolbox developed and agreed	15 months after the beginning of the contract

WORK PACKAGE 3 – Development and implementation of an EMS data management platform (Energy Management Dashboard, EMDb) to be used in Georgian municipalities.

The objective of the **WP 3** is to develop an electronic data management system that a) fulfils the needs of the municipalities and b) is compatible with the Monitoring and Verification Platform (MVP) of the Georgian government which is used to report energy savings to the Energy Community; ideally the MVP is used by the consultant to adjust it to the needs of the municipalities (preferred option). Additionally, the EMS tools developed in WP1 have to be gathered electronically and put into a form that makes it easily accessible and useable for municipalities.

After the analysis of already existing dashboards on Georgian market, a roadmap for EMS dashboard development must be created. Depending on the state of CCODMS or other similar dashboards already in use in Georgia, creation of a new dashboard or improvement of an already existing one can be necessary. The decision on which solution to choose must be agreed by the main stakeholders of the project.

Depending on the solution chosen, Key expert 3 might need a different number of workdays than specified in Costing requirements.

The software programming, including final translation of all texts to be displayed in the software is the core task of this work package. The EMDB must be operable in Georgian as well as in English language.

The EMDB should include the following functionalities:

- Energy data collection and entry
- Other data (e.g., financial) entry through the tool's interface
- Display of energy, financial and CO2-related data through tables and charts
- Possibility to track and monitor data changes through time
- Ability to export data to be used in reporting and preparing action plans
- Centralized solution, hosted by a governmental structure, such as MEPA or MoESD.
- Integrated management of municipal assets: planning, execution
- Monitoring, evaluation and reporting
- Module for the simulation of EE/RE solutions (Energy savings, CO2 savings, financial savings)
- Compatibility with the Monitoring and Verification Platform (MVP) of MoESD
- Steering, monitoring and management of SECAP's energy component. Cartographic visualization, if financially viable
- Multi-user access : municipalities, ministry/ministries etc.

The work package also include:

- Follow-up of the quality of service rendered by the contractor, including checking how the EMS is getting integrated into the systems of the host ministry
- Deployment of a support program: preliminary energy audits (data collection regarding: energy consumption, equipment, information regarding street lighting etc.), training, organizational support, operating support

The activities to be realized under this WP include:

- Providing design specifications document (User interface (UI) and user experience (UX) design, system architecture, functional and non-functional requirements, and integration points with the MVP) for the development of a Beta version of the EMDB tool to be implemented in the pilot municipalities (in Georgian language)
- Development of the beta version of EMDB, testing and agreeing with stockholders
- Supervising the implementation the EMDB in the pilot municipalities by providing coaching sessions to the municipal energy managers and monitoring the results on the ground
- Drafting a report on intermediary evaluation results and recommendations for the final version of the EMBD
- Supervising the development of the final version for the EMDB (Functional software, source code, system architecture documentation, API documentation, maintenance instructions, maintenance schedules, and contact points for technical support) and ensuring its compatibility with MEPA or MoESD hosting requirements
- Updating/finalizing the EMDB user manual and preparing accompanying tutorial videos to be used by the municipalities, including User manuals, help files, and quick reference guides, installation guides, All in Georgian language. Development of an electronic storage structure for all documents, manuals, training material etc. developed

It is important to ensure Georgian translation of the software is tested with the end-users and applies same terminology as provided in the training and an energy manager certification material.

Milestones for WP 3, as laid out in the table below, are to be achieved during the contract term:

Milestones/process steps/partial services	Delivery deadline period
Review functionality and capabilities of already existing EMS dashboards	6 weeks after the beginning of the contract
Test data input capabilities and requirements of already existing EMS dashboards	8 weeks after the beginning of the contract
Concept for the implementation of a municipal EMS dashboard	10 weeks after the beginning of the contract
Developing a beta version of EMS dashboard	5 months after the beginning of the contract
Implementing phase of EMS tool in the pilot municipalities	6 months after the beginning of the contract
Developing the final version for the EMS tool	15 months after the beginning of the contract
Finalizing the EMS tool user manual and preparing accompanying tutorial videos	19 months after the beginning of the contract

WORK PACKAGE 4: Development of an action plan for the roll-out of the EMS in all Georgian municipalities

The objective of **WP 4** is to develop an **action plan for the roll-out of the municipal Energy Management System** together with the EMS tool in all Georgian municipalities.

For the delivery of this WP, the Contractor will draft a proposal, including a timeline for all activities necessary to implement the EMS tool and all necessary capacity building activities for the municipalities. The action plan needs to be based on lessons learnt from this project, which will be included in the project final report.

Milestones for WP 4, as laid out in the table below, are to be achieved during the contract term:

Milestones/process steps/partial services	Delivery deadline period
Action plan for roll-out of the EMS (CWIE)	20 months after the beginning of the contract
Biweekly update meetings with SUD conducted	
Interim project reports presented	Every 6 months
Final project report presented	21 months after the beginning of the contract

In addition to the reports required by GIZ in accordance with the AVB, the contractor submits the following reports:

- Inception report
- Contributions to reports to GIZ's commissioning party
- Brief half-yearly reports on the implementation status of the project

Period of assignment: from . 1 December 2024 until 30. August 2026.

NOTE - relevant for all Work Packages: The documents have to be written in English language. Additionally, the documents that are developed for the municipalities (training materials, presentations etc.) have to be written in Georgian language as well.

The above listed time plans are tentative and show the current status of project planning. They can be subject to change to react to the changing situation in municipalities.

3. Concept

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

Note: The numbers in parentheses correspond to the lines of the technical assessment grid.

Technical-methodological concept

Strategy (1.1): The tenderer is required to consider the tasks to be performed with reference to the objectives of the services put out to tender (see Chapter 1 Context) (1.1.1). Following this, the tenderer presents and justifies the explicit strategy with which it intends to provide the services for which it is responsible (see Chapter 2 Tasks to be performed) (1.1.2). The tenderer is encouraged to state on alternative (or better) ways to implement the work packages deviating from the initial steps as lined out in the ToR.

Section 1.1 must not be longer than 2 pages.

The tenderer is required to present the actors relevant for the services for which it is responsible, have a plan for interaction with them (1.2.1) and describe the strategy for the cooperation with the relevant actors . **cooperation** with the relevant actors (1.2.2)

Section 1.2 must not be longer than 1 page.

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).

Section 1.3 must not be longer than 1.5 pages.

The tenderer is required to describe the key **processes** for the services for which it is responsible and create an **operational plan** or schedule (1.4.1) that describes how the services according to Chapter 2 (Tasks to be performed by the contractor) are to be provided. In particular, the tenderer is required to describe the necessary work steps and, if applicable, take account of the milestones and **contributions** of other actors (partner contributions) in accordance with Chapter 2 (Tasks to be performed) (1.4.2).

Section 1.4 must not be longer than 3 pages.

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

Section 1.5 must not be longer than 1 page.

Project management of the contractor (1.6)

The tenderer is required to explain its **approach for coordination** (1.6.1) with the GIZ project. In particular, the project management requirements specified in Chapter 2 (Tasks to be performed by the contractor) must be explained in detail.

The tenderer is required to draw up a **personnel assignment plan** (1.6.2) with explanatory notes that lists all the experts proposed in the tender; the plan includes information on assignment dates (duration and expert months) and locations of the individual members of the team complete with the allocation of work steps as set out in the schedule.

Section 1.6 must not be longer than 2 pages.

4. Personnel concept

The tenderer is required to provide personnel who are suited to filling the positions described, based on their CVs (see Chapter 8), 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.

Team leader/Energy efficiency expert

Tasks of the Team leader/ Energy Efficiency expert

- Overall responsibility for the advisory packages of the contractor (quality and deadlines)
- Coordinating and ensuring communication with GIZ, partners and others involved in the project
- Coordinating with an international expert hired by SUD
- Inform the international expert for the necessity of travel to Georgia 2 weeks prior to the date
- Personnel management, in particular identifying the need for short-term assignments within the available budget, as well as planning and steering assignments and supporting local and international short-term experts
- Regular reporting in accordance with deadlines
- Contributions to the concrete implementation of the work packages
- Development of EMS tools and materials
- Communication with stakeholders
- Moderation of trainings and contribution of expertise to trainings

Qualifications of the Team leader/ Energy Efficiency expert

- Education/training (2.1.1): university degree (Master or comparable) in energy, economics or other discipline of relevance for the implementation of the assignment

- Language (2.1.2): C1-level language proficiency in English
- General professional experience (2.1.3): 10 years of professional experience in the sustainable energy sector
- Specific professional experience (2.1.4): 5 years of professional experience in total in energy efficiency in municipalities, energy auditing, development and/or implementation of management tools in municipalities
- Leadership/management experience (2.1.5): 5 years of management/leadership experience as project team leader or manager in a company or a public institution in the field of energy efficiency
- Regional experience (2.1.6): 2 years of work in the South Caucasus region
- Development cooperation (DC) experience (2.1.7): 3 years of experience in sustainable energy projects in developing countries
- Networking competence (2.1.8) and leadership experience in facilitating knowledge exchange amongst Georgian local governments: 3 years' experience with Georgian networks of public institutions and working groups of different municipalities, such as covenant of mayors in the field of energy efficiency and renewable energy

Key expert 1 – Energy Efficiency Expert

Tasks of key expert 1

- Development of EMS tools and materials
- Communication with stakeholders
- Facilitation of trainings and contribution of expertise to trainings

Qualifications of key expert 1

- Education/training (2.2.1): University degree (Master or comparable) in a field with a strong link to energy
- Language (2.3.2): C1-level language proficiency in English
- General professional experience (2.2.3): 10 years of experience in energy efficiency sector, e.g. as an auditor or in an energy service company etc.
- Specific professional experience (2.2.4): 5 years of experience in municipal energy efficiency and renewable energy projects
- Regional experience (2.2.6): 2 years of work in the South Caucasus region
- Development Cooperation (DC) experience (2.2.7): 2 years of work experience in developing countries
- Other (2.2.8): Establishment and moderation of 2 Learning Energy Networks or similar entities.

Key expert 2 – Energy Efficiency and Renewable Energy Expert

Tasks of key expert 2

- Development of EMS tools and materials with a focus on energy efficiency and renewable energy
- Communication with stakeholders
- Moderation of trainings and contribution of expertise to trainings and moderation of LEN

Qualifications of key expert 2

- Education/training (2.3.1): University degree (Master or comparable) in a field with a strong link to energy
- Language (2.3.2): C1-level language proficiency in English
- General professional experience (2.3.3): 10 years of professional experience in Energy Efficiency, Energy auditing, development of energy management tools, and trainings

- Specific professional experience (2.3.4): 5 years of experience in municipal energy efficiency and renewable energy projects
- Regional experience (2.3.6): 10 years of work experience in Georgia in the energy sector
- Other (2.3.8): Experience in moderation of 5 workshops or trainings

Soft skills of team members as mentioned under Key Expert 1.

Key expert 3 – Information Technology (IT) Expert

Tasks of key expert 4

- Assessment of technical state of already existing EMS dashboards in Georgia
- Development of EMDB software solution
- Contribution to trainings and contribution of expertise to trainings regarding the operation of the EMDB

Qualifications of key expert 4

- Education/training (3.5.1): University degree (Master or comparable) in IT
- Language (2.3.2): C1-level language proficiency in English
- General professional experience (3.5.3): 5 years of experience in software solution development
- Specific professional experience (3.5.4): 5 years of experience in municipal energy efficiency and renewable energy projects
- Regional experience (3.5.6): 5 years of work in the South Caucasus region

Soft skills of team members as mentioned under Key Expert 1

5. Costing requirements

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.

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 per expert	Total	Comments
Designation of Team leader/ Energy Efficiency expert	1	52	50	
Designation of key expert 1	1	52	50	
Designation of key expert 2	1	52	50	
Designation of key expert 3	1	30	30	
Travel expenses	Quantity	Price	Total	Comments
Per-diem allowance in country of assignment				
Overnight allowance in country of assignment				
Other costs	Number	Price	Total	Comments
Flexible remuneration	1	GEL 5.000	GEL 5.000	Please incorporate this budget into the price schedule. Use of the flexible remuneration item requires prior written approval from GIZ.

6. Workshops and training

Please describe in your concept how you implement GIZ's minimum standards for sustainable event management (see annexes to the terms of reference).

The contractor implements the following workshops and training courses, all to be conducted in Georgia:

- Kick-off workshop
- Training of 4 pilot cities, including EMDB training. The international expert will moderate up to 2 training modules, dates of those trainings chosen by team leader and approved by SUD.
- LEN meetings

The type and style of trainings is not yet fixed. The consultant will have to discuss with GIZ on what trainings are necessary at what point of the learning curve of the persons in the municipalities. The consultant has to make a suggestion in the technical offer on how such a structure of trainings can look like. Training organization, the costs of training venue, catering and transport will be covered by SUD.

7. Inputs of GIZ or other actors

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

- Transportation in regions of Georgia with SUD vehicle. Contractor will cover the transportation expenses if they chose to travel by their means.
- Logistics (printing materials, conference packages, translation services, and accommodation and transportation of the Georgian participants, if required) for workshops: will be paid for by GIZ.

8. Requirements on the format of the tender

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

The complete tender must not exceed the above mentioned number of 10,5 pages (excluding CVs). If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment. External content (e.g. links to websites) will also not be considered.

The CVs of the personnel proposed in accordance with Chapter 4 of the ToR 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. The CVs have to be submitted in English.

Please calculate your financial tender based exactly on the parameters specified in Chapter 5 Quantitative requirements. The contractor is not contractually entitled to use up the days, trips, workshops or budgets in full. The number of days, trips and workshops and the budgets will be contractually agreed as maximum limits. The specifications for pricing are defined in the price schedule.