

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

Baseline survey of companies	Project number/ cost centre: 23.2227.9-001.00
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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
BMZ	The Federal Ministry Economic Development BMZ
CD	Capacity Development
CzDa	Czech Development Agency
CDS	Czech Development Cooperation
DCFTA	Deep and Comprehensive Free Trade Area
EG	Enterprise Georgia
EU	European Union
FK	Expert
FKT	Expert days
GAC	Georgian Accreditation Center
GCCA	Georgian Competition and Consumer Agency
GeoSTM	Georgian National Agency for Standards and Metrology (GeoSTM), Georgian
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
KZFK	Short-term expert
M&E	Monitoring and Evaluation
MoESD	Ministry of Economy and Sustainable Development
MSA	Market Surveillance Agency
QUIS	Quality Infrastructure Better Goods and Services
ToRs	Terms of reference

1. Context

The multi-donor project “QUIS - Better Goods and Services” on 'Enhancing Company's Competitiveness through Quality Infrastructure' in Georgia (hereafter - QUIS) is jointly co-financed by the European Union, the Federal Ministry Economic Development BMZ and Czech Development Cooperation (CDC) and implemented by GIZ and CzDA. The project timeline is scheduled till January 31, 2027.

Overall objective of QUIS is to ensure safety and promote inclusive and sustainable economic growth in Georgia through improved competitiveness of the private sector and implementation of the DCFTA and its EU related commitments, with a particular focus on business, trade, environment, and better skills matching.

Notably, QUIS targets the following outputs:

Output 1: Optimized regulatory and policy framework for quality infrastructure in line with EU and international requirements that promotes competitiveness of the Georgian products (goods and services).

Output 2: Improved compliance with European and international standards of conformity assessment bodies (incl. laboratories).

Output 3: Improved compliance with European and international standards of local producers.

Output 4: Raised awareness for Georgian companies regarding the potential of private standards or state regulation, including the services offered by public and private organizations within the system of notified bodies.

Output 5: Intensified cooperation between quality infrastructure institutions and private sector actors.

The partner of the project at the political level is Georgian Ministry of Economy and Sustainable Development (MoESD). Narrower portfolio of partners encompasses public bodies supervised by MoESD, such as Georgian National Agency for Standards and Metrology (GeoSTM), Georgian Accreditation Center (GAC), Market Surveillance Agency (MSA), Georgian Competition and Consumer Agency (GCCA) and Enterprise Georgia (EG).

Notably, QUIS project reports both to EU log frame and BMZ results matrix. Its primary objective is to assist Georgian companies in meeting European and international standards and quality requirements. Beneficiary companies have been preliminarily identified through focus group discussions and an online survey. The project plans to implement various activities with these companies to achieve its objectives. At this initial stage, it is crucial to gather baseline information on the selected companies for effective monitoring and evaluation of the project that involves case management monitoring. The gathered baseline data will enable tracking of progress during the implementation phase, as well as after the project's conclusion.

To ensure comprehensive reporting aligned with project outputs and outcomes, baseline information must be collected in accordance with the following defined output and outcome target indicators:

Output indicators:

Companies that took measures to comply with standards (disaggregation: women-led companies) (EU);

Companies that took measures to comply with regulations that will apply from 2024 (disaggregation: women-led companies) (EU);

Companies have taken measures relevant to compliance with a regulation that will come into force in 2024 (disaggregation: companies run by women) (BMZ);

Companies have taken measures relevant to compliance with a norm or standard (disaggregation: companies run by women) (BMZ);

Number of success stories of companies that have met EU standards or government regulations and increased their product quality shared publicly (disaggregation: women-led companies) (EU);

Persons from companies each confirmed based on a specific case study, that their knowledge in the area of product quality has been improved after participation in gender-responsive awareness and capacity development (CD) measures (disaggregation: women) (BMZ).

Outcome indicators:

Number of firms or individuals supported that meet standards and technical requirements (disaggregation: sex, age and firm size) (EU);

Georgian companies have each received a new certificate of conformity with international norms or standards relevant to export to the EU or complied with the requirements of national regulation in selected sectors (disaggregation: women) (BMZ);

Number of firms or individuals that utilise business development services supported by intervention (disaggregation: type of service, type of entity, firm size, and sex) (EU);

Surveyed companies from selected sectors that used a service from a Georgian testing or calibration laboratory confirmed, based on a case study, that they were able to place themselves better in local or international quality competition (BMZ);

Number of businesses introducing a new product/service to the market with intervention support (disaggregation: women-led companies) (EU);

The formulations and requirements of output and outcome indicators will serve as a bases of developing survey questions for companies, as well as for provision of data.

2. Tasks to be performed by the contractor

The contractor is responsible for providing the following services:

- **Preparation of methodology and survey tools**
Develop a questionnaire for the baseline survey that aligns with the project target indicators outlined above. This should be done in close collaboration with GIZ M&E expert as many survey questions have already been identified. The questionnaire must be concise, methodologically sound, and suitable for phone interviews ensuring that interviews do not exceed 15 minutes. The questionnaire should be on both Georgian and English languages.
- **Field work and field report**
Conduct the baseline survey through phone interviews with project companies. Total number of companies to be surveyed is up to 130. Importantly, the list of companies is identified and will be delivered to the contractor from GIZ. Contractor is expected to conduct a phone

survey with each company. In case of non-response, the contractor will call back the beneficiaries two additional times. Field report should be submitted to the GIZ team after conclusion of interviews. The field work should be conducted in Georgian, while the field report is requested to be provided in English.

- Data analysis and database management

Quis project employs a case management monitoring system and maintains a database of companies in line with output indicator requirements (related to survey questions). Upon the completion of the survey, contractor should input the parts of raw data into the existing database, ensuring that it contains answers to each question as outlined in the questionnaire, along with relevant beneficiary information. Additionally, contractor will provide GIZ with the raw data. Quality control mechanisms should be implemented to ensure the accuracy and validity of the database. The database should be filled in in English.

- Data visualization

Apart from final report, contractor is requested to provide visuals (infographics, graphs, charts, diagrams,) for the major findings in agreement with the GIZ team. Visuals should be presented during debriefing workshop. Data visuals should be implemented in English.

- Final report and debriefing

Provide a comprehensive final report. The report should consist of a narrative section detailing the survey results, including methodology, demographics, analyses, challenges, recommendations, etc.. and of a visualization part. Findings should be presented during final debriefing workshop. Final report and workshop should be implemented in English.

The services outlined above should be carried out in close collaboration with GIZ. In order to consider services as final, drafts should be shared and approved by GIZ team. Additionally, several meetings will be held as required through the process, including a mandatory kick-off meeting and a final presentation (de-briefing).

Milestones/partial works	Deadline/place/person responsible	Criteria for acceptance
Preparation of methodology and survey tools	06.12.2024	Survey methodology is designed and questionnaire is developed according to projects target indicators. Draft questionnaire is reviewed by GIZ and final questionnaire is approved.
Field work and field report	30.12.2024	Phone survey is conducted with all project beneficiaries from the provided list. Field report is provided to GIZ.
Data analysis and database management	31. 01. 2025	The database of GIZ QUIS project is filled in with survey results according to each

		question on each beneficiary and approved by GIZ.
Data visualization	14.02.2025	Main findings are reflected in visuals such as infographics, charts, diagrams etc.
Final report and debriefing workshop	28.02.2025	Final report is approved by GIZ. Debriefing workshop is held consisting of presentation of main findings (visualization part is included).

Period of assignment: from 25.11.2024 until 28.02.2025.

3. Concept

In the tender, the tenderer is required to show *how* the objectives 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.

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 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

Project management of the contractor (1.6)

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

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

Experience of the company (3)

The tenderer is required to describe **experience of the company/organization in conducting the similar projects** (3.1) as well as the **years of experience in designing and conducting researches** (3.2).

4. Personnel concept

The tenderer is required to provide personnel who are suited to filling the positions described, on the basis of their CVs, 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

Tasks of the team leader

- Overall responsibility for the advisory packages of the contractor (quality and deadlines)
- Coordinating and ensuring communication with GIZ, stakeholders and others involved in the project
- Personnel management, in particular identifying the need for short-term assignments within the available budget, as well as planning and steering assignments
- Regular reporting in accordance with deadlines

Qualifications of the team leader

- Education/training (2.1.1): university degree in social sciences, statistics or relevant field
- Language (2.1.2): Excellent business language skills in Georgian and English
- General professional experience (2.1.3): at least 7 years of professional experience in the survey design and implementation
- Specific professional experience (2.1.4): at least 7 years in the field of research
- Leadership/management experience (2.1.5): at least 5 years of management/leadership experience as project team leader or manager in a company
- Development cooperation (DC) experience (2.1.7): at least 4 years of experience in DC projects

Short-term expert pool

For the technical assessment, an average of the qualifications of all specified members of the expert pool is calculated. Please send a CV for each pool member for the assessment.

Tasks of the short-term expert pool

- Responsibility for key research processes including development of data collection instruments, fieldwork, data analysis and report writing; Ensuring the provision of accurate data; Provision of advice and guidance for technical matters in the area of expertise

Qualifications of the short-term expert pool

- Education/training (2.6.1): experts with university qualification in social sciences and/or relevant fields such as business, economics, statistics, public administration, development studies
- Language (2.6.2): All experts with excellent Georgian and English C1
- General professional experience (2.6.3): experts with at least 5 years of professional experience in the data analysis, statistics, demonstrated experience in data visualization

such as Power BI, Tableau, etc; knowledge in the field of Monitoring and Evaluation/research

- Specific professional experience (2.6.4): experts with at least 5 years of professional experience in both quantitative and qualitative research projects, including research design, developing data-collection instruments, field coordination, conducting large scale surveys, collecting and analysing data, etc.
- Development cooperation (DC) experience (2.6.6): All experts with at least 3 years of experience in DC

The tenderer must provide a clear overview of all proposed short-term experts and their individual qualifications.

5. Costing requirements

The following basic calculations for the contract for works are a reference value based on the acceptance criteria for each partial work/milestone specified in Chapter 2 (Tasks to be performed by the contractor).

Since the contract to be concluded is a contract for works, we would ask you to offer your services at a lump sum price.

In addition, the assessment of the financial bid is also based on the underlying daily rate. Please also provide the underlying daily rate. A breakdown of days is not required.

Milestones/partial works	Estimated expert days for orientation	Deadline/place/person responsible
Preparation of methodology and survey tools	10	06.12.2024
Fieldwork and field report	20	30.12. 2024
Data analysis and database management	20	31. 01. 2025
Data visualization	10	14.02.2025
Final report and debriefing workshop	10	28.02.2025

Please describe in your concept how you implement the minimum standards specified above.

6. 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 (language).

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

The CVs of the personnel proposed in accordance with Chapter 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 can also be submitted in English (language).

As the contract to be concluded is a contract for works, please offer a fixed lump sum price that covers all relevant costs (fees, travel expenses etc.). The price bid will be evaluated on the basis of the specified lump sum price. In addition, please also provide the underlying daily rate. A breakdown of days is not required.

The financial offer should be prepared using the provided price schedule template

7. Outsourced processing of personal data

Data Protection

Personal data will be processed on behalf of the client. Therefore, an agreement on “Outsourcing of data processing (AuV)” will be concluded with the contractor in accordance with Art. 28 GDPR. For this purpose, the technical and organisational measures (TOM) for compliance with the data protection requirements must be outlined prior to conclusion of the contract. After a positive check, the contract is concluded with the AuV attachment.

The survey upgraded or used on behalf of GIZ must meet the highest data protection standards, especially the GDPR’s data protection by design and by default requirement, as elaborated in Annex 1. “The development of a data processing system under the GDPR”, to offer practical orientation to the contractor.