

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

CONFIDENTIAL

BioPANZA MSME Pipeline Pilot – Support the Management, Categorisation, Technical Support and Referral of MSMEs through the BioPANZA Diagnostic Assessment and Referral Tool

**Project number/
cost centre:**
G-012159-201
Tender number

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0. List of abbreviations

ABioSA	ABS Compliant Biotrade in South(ern) Africa
AG	Commissioning party
AN	Contractor
AVB	General Terms and Conditions of Contract for supplying services and work
BABS	Bioprospecting, Access and Benefit Sharing
BioPANZA	BioProducts Advancement Network South Africa
BSOs	Business Support Organisation
CCPS	Centre for Cooperation with Private Sector
CoA	Certificate of Acceptability
DFFE	Department of Forestry, Fisheries and the Environment
DSTI	Department of Science, Technology and Innovation
EBITDA	Earnings Before Interest, Taxes, Depreciation and Amortisation
FK	Expert
FKT	Expert days
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
GACP	Generally Accepted Compliance Practice Framework
GHP	Good Harvesting Practices
GMP	Good Manufacturing Practice
HACCP	Hazard Analysis Critical Control Point
ISO	International Organisation for Standardisation
KZFK	Short-term expert
MAC	Market Access Cluster
MSMEs	Micro, Small and Medium Enterprises
NBES	National Biodiversity Economy Strategy
NEMBA	National Environmental Management: Biodiversity Act
QMS	Quality Management System
SECO	Swiss State Secretariat for Economic Affairs
SDPs	Sector Development Plans
ToRs	Terms of reference
The dtic	The Department of Trade, Industry and Competition

1. Context

The ABS Compliant Biotrade in South(ern) Africa (ABioSA) phase III is implemented by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) under the Global Project called “Strengthening national implementation of global biodiversity targets”. It is housed in GIZ South Africa under the Centre of Cooperation with Private Sector (CCPS), funded by the Swiss State Secretariat for Economic Affairs (SECO) and is executed in close partnership with the Department of Forestry, Fisheries and the Environment (DFFE).

ABioSA supports the achievement of key government targets as set out in the National Biodiversity Economy Strategy (NBES), including economic growth, transformation and sustainability. Within this context the project also supports the prioritisation of national indigenous species identified for cultivation and sustainable harvesting.

ABioSA Phase III aims to **contribute to the long-term impact of creating a competitive, resilient, prosperous, inclusive, and sustainable ABS-compliant biotrade sector in southern Africa**. It builds on Phases I and II by further supporting the simplification of compliance pathways, strengthening biodiversity safeguards, improving sector coordination, and reinforcing and building the capacity of smaller and emerging enterprises to participate more equitably in domestic and international value chains.

Building on results from Phases I and II, ABioSA Phase III continues to use the systemic competitiveness framework (Esser et al., 1995) across three interconnected outcome areas: The three project outcome areas correspond with the micro, meso and macro levels of the above-mentioned framework;

1	Micro level - Programmatic technical and financial enterprise support to MSMEs alongside other Business Support Organisations (BSOs) under the BioPANZA Market Access Cluster (MAC).
2	Meso level - Strengthening industry associations and sector bodies to facilitate implementation of Sector Development Plans (SDPs) and cross-sector initiatives.
3	Macro/meta level - Supporting inclusive government strategy and a knowledge management ecosystem to raise awareness, share learning and advocate for an enabling biotrade environment.

This Terms of Reference (ToR) relates exclusively to **Outcome 1**: the micro-level support to MSMEs through the BioPANZA diagnostic assessment and referral tool. It calls for a service provider or consortium of consultants to manage, technically support and refer a pilot cohort of 70 MSMEs drawn from the BioPANZA MSME database. However, close cooperation will be required with the other two levels’ activities and actors.

As this is the third and final phase of ABioSA, the project would like to ensure on Outcome level 1 to *“leave behind a functional and tested management and referral tool, so that BSOs can access relevant pre-selected MSMEs according to their support criteria enabling MSMEs to access blended finance and technical support that will create a sustainable environment to build on by a healthy biotrade ecosystem”*.

The enterprise/MSMEs level (micro level) is where the tangible results and economic growth of the sector is recognised and can be a result of a functional enabling environment/ecosystem. Enterprises/MSME in the biotrade/bioprospecting sector typically face multiple challenges such as limited access to finance, difficulties complying with Access and Benefit Sharing (ABS) and related regulatory frameworks, and non-tariff market constraints in reaching both domestic and international markets.

ABioSA has progressively built its MSME support capacity across phases:

Phase	MSME Support Activity
Phase I	17 MSMEs supported financially on a 50/50% matching principle to overcome non-tariff barriers and meet compliance requirements for domestic and international market access. Start-ups and emerging MSMEs also received technical training to apply for funding amongst others.
Phase II	6 MSMEs financially supported on the same 50/50% principle. 9 start-ups/emerging MSMEs/cooperatives supported through a mentoring and coaching programme focused on GMP, GHP, GACP, HACCP (food sector) and GMP (cosmetics sector). 10 additional MSMEs received mentorship and coaching technical support.
Phase III (this assignment)	70 MSMEs to be selected from the BioPANZA database as a pilot. All 70 MSMEs to receive due diligence preparation support ABioSA to provide direct financial support to 10 export-ready/exporting MSMEs 10 further MSMEs to receive focused technical support. The remaining 50 are referred to appropriate BSOs through the referral tool.

On the public front, BioPANZA was initiated in 2016, which is a tri-chairmanship between the Department of Forestry, Fishery and Environment (DFFE), the Department of Trade, Industry and Competition (the dtic) and Department of Science, Technology and Innovation (DSTI). BioPANZA is mandated to ensure coordination, effective and efficient collaborations between various players in the sector in order to support the pipeline of biotrade MSMEs and in so doing reduce the search and discovery costs for technical and financial support where and when needed.

In 2023, the DFFE Bioprospecting and Biodiversity Economy directorate (ABioSA's direct government partner) requested the project to support with a market analysis and update of the commercial bioprospecting market information of South Africa based on the 2013 data as per the National Biodiversity Economy Strategy (NBES). The 2023 study conducted a market analysis of the commercial bioprospecting and biotrade market of South Africa including existing MSMEs and an analysis of South African natural ingredients within the global market. The work included an intensive survey of products containing indigenous natural ingredients, analysed trade data and consulted with biotradors and bioprospectors.

In addition, a draft curated biotrade MSME directory based on the MSME data within the economic sector was developed. This provided a good basis for the development of the MSME diagnostic survey that was issued as part of the MSME call for Expression of Interest (step 1) for biotrade MSMEs in November 2025 as a two-step application process to be registered on the BioPANZA MSME database.

2. Background

To date, 122 MSMEs across seven southern¹ African countries (South Africa, Namibia, Lesotho, Botswana, Zimbabwe, Malawi and Zambia) have completed the diagnostic survey (step 2) and are profiled on the BioPANZA MSME database. Each MSME holds an individual eight-category Assessment Report covering Business Stage, Orientation, Compliance, Financial Performance, Market Readiness, Assistance Needs, Employment and Skills, and Revenue Mix.

The BioPANZA MAC management team (DFFE & ABioSA) developed a Process Manual that governs the extract, referral and feedback cycle through which approved BSOs receive an extract of pre-selected MSMEs for potential support. The service provider appointed under this ToR will work as a technical arm of the BioPANZA MAC management team, operating within the BioPANZA governance framework.

The BioPANZA MSME Pipeline Management and Referral Tool content to extract, refer, track, update, monitor, report and communicate the progress of the pilot has already been developed. The successful service provider will receive a production-ready, web dashboard application that includes the following:

1. Full application structure, files and components
2. Complete working code — not pseudo code
3. Database schema and setup documentation
4. Example queries covering filtering, grouping and counts

At this stage, the tool and all its functionalities are demonstrated in Excel format. The service provider will be able to take this package, upload the underlying Excel and CSV files, and deploy it as a fully live, hosted application with clear navigation between dashboard and detail views. The MAC management team has been testing and verifying the tool's functionalities and refining processes in consultation with stakeholders.

The tool includes the following 11 processes:

¹ It should be noted that although BioPANZA focuses only of South African based MSMEs, ABioSA's mandate spans over the southern African region and therefore will include a certain number of MSMEs from neighboring countries. The general ratio is about 70% SA & 30% from the neighboring countries' MSMEs.

1. MSME intake and onboarding
2. MSME master database
3. MSME Pilot cohort tracker
4. Workshop and peer learning tracker
5. BSO extract and referral tracker
6. Engagement and milestone log
7. BioPANZA Investment committee presentation register
8. Cross-cluster database engagement
9. Quarterly reporting
10. BioPANZA bi-annual steering committee reporting
11. MSME/stakeholder communication and outreach

3. Tasks to be performed by the contractor

This assignment aims to support the BioPANZA MAC management team with the end-to-end management, update, technical support, monitoring and referral of a pilot cohort of 70 MSMEs drawn from the BioPANZA database, demonstrating the functionality of the diagnostic assessment and referral tool in application format as a one-stop pipeline instrument for the southern African biotrade sector.

PILOT COHORT STRUCTURE		
Group	Nr of MSMEs	Type of support
Database	122	Database of MSMEs that have completed the diagnostic survey to select the pilot cohort from.
Total pilot cohort	70	Full pilot cohort across all lifecycle stages and categories. Light due diligence preparation support provided to all.
Group 1	10	Direct financial support by ABioSA - Export-ready and actively exporting MSMEs (Growth Ready / Fully Compliant stage).
Group 2	10	ABioSA focused technical support provided by the service provider - Emerging and Established stage MSMEs progressing through the pipeline.
Group 3	50	Referral to appropriate BSOs by the service provider in coordination with the BioPANZA MAC management team.

The possibility of forming a consortium with another consultancy is permissible if not all the experience and skills are in-house.

The contractor (consultancy or consortium) shall be responsible for the following tasks:

TASK 1: Inception: briefing and preparation

TASK 2: Web application functionality

TASK 3: MSME Selection and Pilot Cohort Finalisation

TASK 4: Financial Support Selection: Export-Ready MSMEs (Group 1)

TASK 5: Technical Support: Emerging and Established MSMEs (Group 2)

TASK 6: Workshop facilitation

TASK 7: BSO Referrals and Pipeline Coordination (Group 3)

TASK 8: Pipeline Management, Monitoring and Reporting

The below table breaks down the tasks of the assignment, recognising that some of these tasks and activities will run concurrently and therefore reasonable/moderate modifications to the milestone dates can be accommodated.

Milestones/process steps/partial services	Deadline/place
TASK 1: Inception - Briefing/preparation with the BioPANZA MAC management team.	End September 2026
The service provider shall conduct a structured inception phase with the BioPANZA MAC management team (which includes ABioSA and DFFE representatives). This phase establishes the operational framework for the entire assignment and finalisation of the tool to be used.	
<p>Sub-activities:</p> <ul style="list-style-type: none"> Attend a formal inception meeting with the BioPANZA MAC management team which consist of the DFFE bioeconomy officer and the ABioSA component manager Study and internalise all provided tools and instruments as listed above and relevant SDPs. Agree on roles, responsibilities, communication protocols, reporting lines and decision-making processes with the MAC management team. Review and refine the MSME categorisation and selection criteria and methodology for the 70-MSME pilot cohort in consultation with the MAC team. Submit an Inception Report within 30 days of contract commencement confirming the agreed work plan, revised timelines and MSME categorisation and selection criteria and methodology. Fully functional web dashboard application/tool 	
<p>Deliverables</p> <p>Inception Report including agreed work plan, MSME categorization and selection criteria and methodology and refined timelines. Fully functional application/tool.</p>	Within 30 days of contract commencement (by end September 2026).
TASK 2: Web application functionality	± Oct'26 – Mar'28
The service provider shall deploy the tool and all its functionalities as a fully live, hosted application with clear navigation between dashboard and detail views.	
<p>Sub-activities:</p> <ul style="list-style-type: none"> Review the production-ready web dashboard application package handed over by the BioPANZA MAC management team, including the application structure, files, components, working code, database schema, setup documentation and example queries. 	

<ul style="list-style-type: none"> • Verify and test the tool functionalities and processes against the work already completed by the MAC management team, and document any defects, gaps or refinements required prior to deployment. • Ingest the underlying Excel and CSV files provided by the MAC management team into the application database in line with the documented schema and validate data integrity after ingestion. • Deploy the application to a secure, hosted production environment with clear navigation between the dashboard and detail views, and configure user access, authentication and role-based permissions consistent with the BioPANZA MAC management team Process Manual and POPIA requirements. • Operate, maintain and provide technical support for the live application throughout the assignment period, including bug fixes, minor enhancements, performance monitoring, backups, security patching and version control. • Integrate the preparation, execution and final actions and reporting of Tasks 1 to 8 into the online tool, ensuring that all 11 processes covered by the tool function end-to-end. • Configure and maintain the reporting and extract functionalities required for quarterly reports, the annual summary report, the final assignment report, BSO extracts and Feedback Reports 1 and 2. • Provide user training and written user documentation to the BioPANZA MAC management team and the rest of the service provider team on the use, administration and reporting features of the tool. 	
<p>Deliverables Hand over a fully functional, documented and hosted application to the BioPANZA MAC management team at the end of the assignment, including source code, deployment instructions, administrator credentials and a maintenance handover note.</p>	<p>Initial review of tool by end Oct 2026; Implementation through to May 2028; Final handover by May 2028.</p>
<p>TASK 3: MSME Selection and Pilot Cohort Finalisation</p>	<p>End October 2026</p>
<p>The service provider shall support the BioPANZA MAC management team in finalising the selection of 70 MSMEs from the existing 122-MSME BioPANZA database to form the pilot cohort. Selection will be drawn across all five lifecycle categories to showcase the full functionality of the referral tool.</p>	
<p>Sub-activities:</p> <ul style="list-style-type: none"> • Apply the agreed selection criteria to the BioPANZA MSME dashboard and assessment reports to identify a ranked shortlist of MSMEs per lifecycle category. • Conduct an initial engagement with shortlisted MSMEs to confirm interest and verify key data points (turnover, export status, certifications, contact details). Flag discrepancies for database update. • Present a ranked selection list to the BioPANZA investment committee/MAC management team for approval, with clear rationale per MSME and per group (Groups 1, 2 and 3 as defined above). 	

<ul style="list-style-type: none"> • Coordinate with the BioPANZA MAC management team to issue formal MSME selection notification letters to all 70 selected MSMEs. • Provide light preparatory support to all 70 MSMEs in the form of an online-workshop covering: understanding of due diligence requirements, introductory briefing on programme obligations and expected engagement modalities. <ul style="list-style-type: none"> – Due diligence support areas include: legal registration status, audited or management financial statements, governance documentation, procurement procedures, and HR policies. Support level is light-touch - the service provider prepares MSMEs for due diligence, not conducts it on their behalf. • <i>Special attention should be given to DFFE and SECO priority targets/indicators such as jobs, gender, access to markets, capacity building measures, etc when selecting the MSMEs for the support. These targets and indicators shall be shared with the successful bidder.</i> • Integrate preparation and final actions and reporting in the online tool 	
<p>Deliverables: MSME Selection Report as extracted from the tool (ranked shortlist, selection rationale, engagement summary, data verification log).</p>	<p>By end October 2026 (2 months after contract commencement).</p>
<p>TASK 4: Financial Support Selection: Export-Ready MSMEs (Group 1)</p>	<p>By 15 December 2026</p>
<p>The service provider shall support the BioPANZA MAC management team and investment committee in the identification, assessment and recommendation of 10 Export-Ready and actively exporting MSMEs (Growth Ready or Fully Compliant stage) for direct financial support by ABioSA on a 50/50% basis. This group represents the most commercially advanced MSMEs in the pilot.</p>	
<p>Sub-activities:</p> <ul style="list-style-type: none"> • Conduct detailed desktop assessments of eligible candidate MSMEs based on the BioPANZA assessment reports, supplemented by direct engagement and any available financial documentation. • Invite eligible MSMEs (exporting status, turnover, compliance posture, ABS/bioprospecting permits) to submit proposals based on the ABioSA template. • Evaluate the proposals (together with the MAC management team) against the ABioSA project financial support criteria to get to the Group 1 shortlist. • Prepare individual MSME investment readiness profiles for short listed Group 1 candidates, summarising: value chain position, revenue mix, export markets, certification status, IP portfolio, growth potential and identified financial support need. • Present recommendations to the BioPANZA investment committee with supporting documentation, clearly distinguishing between MSMEs recommended for direct 	

<p>ABioSA financial support and those to be referred to alternative support.</p> <ul style="list-style-type: none"> • Support the BioPANZA MAC management team in documenting the committee's decision and communicating outcomes to selected MSMEs. • Align recommendations with the relevant SDPs - particularly Buchu, Honeybush, Marula, Baobab, Sceletium tortuosum, Aloe ferox and Essential Oils — and the seven SDP pillars. • Hand over the Investment Committee recommended MSME reports to ABioSA to proceed with the internal GIZ procurement process. • Integrate preparation and final actions and reporting in the online tool 	
<p>Deliverables: 10 Investment Readiness Profiles + Financial Support Recommendation Report submitted to BioPANZA investment committee and ABioSA component manager extracted from the tool</p>	<p>By 15 December 2026 (3½ months after contract commencement).</p>
<p>TASK 5: Technical Support: Emerging and Established MSMEs (Group 2)</p>	<p>± Feb'27 – May'28</p>
<p>The service provider shall provide focused, individualised technical support to 10 MSMEs in the Emerging or Established lifecycle stages, specifically selected from Group 2 to progress through the BioPANZA pipeline towards the next category.</p>	
<p>Sub-activities:</p> <ul style="list-style-type: none"> • Select 10 MSMEs from the Group 2 shortlist based on growth potential, sector alignment, geographic spread and the gaps identified in their individual BioPANZA Assessment Reports. • Develop an individualised Technical Support Plan for each of the 10 MSMEs setting out: current lifecycle stage and composite score, priority support areas, milestones for progression, specific interventions to be delivered, and timelines. • Deliver one-on-one technical assistance to each MSME tailored to their identified needs. Support may include: <ul style="list-style-type: none"> – Quality Management System (QMS) development and implementation (GMP, GHP, GACP, HACCP, ISO as appropriate to sector). – Business plan or growth strategy development, including market analysis and value chain positioning. – Financial management improvement: accounting systems, financial record-keeping, EBITDA management. – Certification roadmap: identifying the most appropriate certification pathway (Organic, GMP, HACCP, CoA, Fair Wild, etc.) and supporting initial steps. – Human resources and governance: HR compliance documentation, risk assessment, B-BBEE affidavit preparation. 	

<ul style="list-style-type: none"> Track progression of each MSME against their Technical Support Plan. Produce quarterly progress updates for inclusion in the BioPANZA MAC management reporting. At the end of the assignment, produce a graduation assessment for each of the 10 Group 2 MSMEs - confirming their progression to the next lifecycle stage or documenting barriers to graduation. Integrate preparation and final actions and reporting in the online tool 	
<p>Deliverables: 10 Individual Technical Support Plans; quarterly progress updates; final graduation assessment per MSME extracted from the tool</p>	<p>Technical Support Plans by February 2027; Implementation through to May 2028; Final graduation assessments by May 2028.</p>
<p>TASK 6: Peer Learning Workshops and Facilitation</p>	<p>± Oct'26 – Mar'28</p>
<p>The service provider shall support the design of the technical content and facilitate the peer learning sessions and workshops for the pilot cohort of MSMEs and follow-up.</p> <p>NOTE: Workshop logistics (venue, catering, travel and accommodation arrangements) will be managed by ABioSA.</p>	
<p>Sub-activities:</p> <ul style="list-style-type: none"> Support the design of a workshop and peer learning programme architecture for the assignment period, integrating <ul style="list-style-type: none"> the Biotrade Marketplace Workshop (November 2026), on-line interim workshop (April/May 2027), the 3rd African Biotrade Festival (ABF, September 2027) final on-line workshop (February/March 2028). Support and make proposals towards the final facilitation plan of the Biotrade Marketplace Workshop technical programme (November 2026, Cape Town): plenary sessions, break-away rooms by destination market, end market and species, and one-on-one service desk appointments. Design and facilitate at least four thematic peer learning sessions (incl. during the above workshop) over the assignment period, covering: <ul style="list-style-type: none"> Export readiness and export regulatory requirements. Market access, marketing, pitching and branding. Financial management, investment readiness and access to blended finance. Compile a post-workshop report after each session, including: attendance, key learnings, MSME feedback, follow-up actions required and any pipeline progression observations. Support MSME preparation for the 3rd ABF (September 2027) - including product presentation, pitch preparation and buyer meeting preparation for selected MSMEs. Integrate preparation and final actions and reporting in the online tool 	

<p>Deliverables: Workshop and peer learning programme design; facilitation support at Marketplace Workshop (Nov 2026) + 2 online thematic sessions; post-workshop reports; pre-ABF preparation support extracted from the tool</p>	<p>Final programme design by October 2026; Workshops throughout the assignment period; 3rd ABF support by September 2027.</p>
<p>TASK 7: BSO Referrals and Pipeline Coordination (Group 3)</p>	<p>± Oct'27 – Jun'28</p>
<p>The service provider shall coordinate the referral of 50 MSMEs (Group 3) to appropriate Business Support Organisations (BSOs) through the BioPANZA referral tool, in accordance with the BioPANZA MAC management - Process Manual.</p>	
<p>Sub-activities:</p> <ul style="list-style-type: none"> • Map the 50 Group 3 MSMEs against the available BSO landscape - drawing on the 2019/20 ABioSA/UNIDO GQSP BSO mapping and BioPANZA cluster members - to identify the most appropriate match per MSME based on lifecycle stage, sector, geography and specific support need. • Together with the BioPANZA MAC management team prepare individual referral reports for Group 3 MSMEs: a brief profile summary, the recommended BSO(s), the rationale for the match and the identified support need. • Work with the BioPANZA MAC management team to issue confidential database extracts to approved BSOs in accordance with the MAC management Process Manual. • Follow up with BSOs at Month 1 (Feedback Report 1: usability and data verification) and Month 3 (Feedback Report 2: MSMEs selected for support) to confirm engagement and collect feedback. • Compile aggregate referral outcomes for inclusion in the quarterly MAC management reports and bi-annual BioPANZA cluster engagement sessions. • Contribute to BioPANZA steering committee reports. • Annual presentation to the Biotrade Stakeholder Forum • Integrate preparation and final actions and reporting in the online tool 	
<p>Deliverables: 50 referral packages; BSO engagement log; Feedback Reports 1 and 2 compilation; aggregate referral outcome reports for bi-annual sessions extracted from the tool.</p>	<p>Initial referrals by December 2027; Ongoing through June 2028;</p>
<p>TASK 8: Pipeline Management, Monitoring and Reporting support</p>	<p>± Sept'26 - Jun'28</p>
<p>The service provider shall provide ongoing technical support to the BioPANZA MAC management team in the management, tracking and reporting of the pilot, serving as the operational backbone of the pipeline monitoring system throughout the assignment period.</p>	
<p>Sub-activities:</p> <ul style="list-style-type: none"> • Maintain and update the BioPANZA MSME Pipeline Management and Referral Tool - tracking all 70 MSMEs' 	

<p>lifecycle stage, support type received, progression milestones, referral status and BSO engagement.</p> <ul style="list-style-type: none"> • Prepare quarterly progress reports for submission to the ABioSA component manager as part of the BioPANZA MAC management team, covering: MSME engagement progress, technical support delivery, referral outcomes, Group 1 financial support progress, Group 2 technical progression, workshop completion and pipeline graduation data. • Prepare an annual summary report at the end of Year 1 (September 2027) documenting achievements, challenges, lessons learned and recommendations for Year 2. <ul style="list-style-type: none"> – ABioSA will request the extraction of important information from the reports to be captured in Knowledge Products in collaboration with the appointed Marketing and Communication service provider for broader sector learning. • Prepare the Final Assignment Report (May 2028) documenting: full pilot outcomes, MSME graduation data, BSO referral effectiveness, workshop impact assessment, case studies of supported MSMEs, lessons learned and recommendations for hand-over. • Support the MAC management team's engagement with the BioPANZA Investment Committee - providing data inputs, progress summaries and recommendations for borderline or contentious categorisation decisions. • Assist the MAC management team in preparing for and present at the bi-annual ABioSA Project Steering Committee meetings, • Provide input on the results-based management (RBM) reporting and any evaluation related to Outcome 1 to the appointed MERL service providers. • Integrate preparation and final actions and reporting in the online tool 	
<p>Deliverables: Quarterly progress reports; annual summary report (Year 1); final assignment report (May 2028); pipeline monitoring data updates extracted from the tool.</p>	<p>Quarterly from contract commencement; annual report September 2027; final report June 2028.</p>

Period of assignment: from 1 September 2026 until 30 June 2028.

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.

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 required to present the actors relevant for the services for which it is responsible and describe the **cooperation (1.2)** with them.

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).

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).

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**.

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.

The contractor shall submit the following reports:

Reports shall be structured and submitted according to deliverable requirements of chapter 3 above. Reports and correspondence shall be submitted in English, according to the reporting requirement of the commissioning party (BMZ). All reports will be shared with the South African partners.

4. Personnel concept

The tenderer is required to provide personnel who are suited to filling the positions described, on the basis of their CVs (see Chapter 7), 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.

The possibility of forming a consortium with another consultancy is permissible if not all the experience and skills are in-house.

Team Leader

Please note that the Team Leader could have expertise listed under the 4 experts in addition to being team lead that should be highlighted in the proposal.

Tasks of the team leader

- Overall coordination and responsibility for the advisory packages of the contractor (quality, procedures and deadlines) in close cooperation/arrangement with the ABioSA component manager as part of the BioPANZA MAC management team and in terms of organising and implementing the deliverables.
- Chair the BioPANZA investment committee meeting.
- Compile programme-level reports.
- Coordinating and ensuring communication with ABioSA, partners 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 and supporting short-term expert pool (incl. consortia members).
- Reporting (technical and financial) in accordance with deadlines.
- Quality assuring of reports, supporting documents and presentation content in accordance with subject matter and deadlines.

Qualifications of the team leader

- Education/training (2.1.1): university degree (Postgraduate) in Business Administration, Development Studies, Natural Resource Management, Environmental Science, or a closely related field with relevance to the biotrade/bioprospecting sector.
- Language (2.1.2): C2-level language proficiency in English.
- General professional experience (2.1.3): 12 years of professional experience in a relevant sector (natural resources, biodiversity economy, agribusiness, enterprise development or related).
- Specific professional experience (2.1.4): 10 years in MSME enterprise development, value chain development or business support programmes in southern Africa.
- Leadership/management experience (2.1.5): 10 years of management/leadership experience as project team leader, within a complex multi-stakeholder environment.
- Regional experience (2.1.6): 10 years of experience in projects in Southern Africa, of which 7 years in projects in South Africa.
- Development cooperation (DC) experience (2.1.7): 8 years of experience in DC in emerging economy projects.
- Other (2.1.8): Results-based management (RBM); Monitoring, Evaluation, Research and Learning (MERL), risk management.

Expert 1

Tasks of Expert 1 - Financial and Investment Specialist

- Provide relevant light preparatory support on understanding due diligence requirements related to finance.
- Lead the Group 1 MSME financial assessment process and activities.
- Develop investment readiness profiles.
- Prepare recommendation report for the BioPANZA investment committee.
- Advise on financial instrument matching for all 70 pilot MSMEs.
- Facilitate the financial management and investment readiness peer learning workshop session(s).
- Sharing and leveraging the value of lessons learned in peer-learning workshops.

Qualifications of Expert 1

- Education/training (2.2.1): university degree (Postgraduate) in Finance, Economics, Business Administration, Commerce or a related field.
- Language (2.2.2): C2-level language proficiency in English.
- General professional experience (2.2.3): 10 years of professional experience in business finance, investment analysis, enterprise development finance or related fields.
- Specific professional experience (2.2.4): 8 years in investment readiness assessments, blended finance instruments, MSME financial support programmes or impact investment in the southern African biotrade, natural ingredients, agri-processing or related sectors.
- Leadership/management experience (2.2.5): 5 years of advisory or management experience leading financial assessment processes or managing a portfolio of investee businesses.
- Regional experience (2.2.6): 5 years of experience in projects in Southern Africa.
- Development cooperation (DC) experience (2.2.7): 3 years of experience in DC in emerging economy projects.
- Other (2.2.8): Integrated financial advisory services; spanning revenue mix analysis, EBITDA assessment, and financial due diligence preparation support, complemented by blended finance structuring, grant and investment instrument mapping, and financial reporting.

Expert 2

Tasks of Expert 2 – Technical Support specialist (Business Management, QMS, GMP, GHP, HACCP, ISO etc)

- Provide relevant light preparatory support on understanding due diligence requirements related to business management and processes.
- Develop and deliver Individual Technical Support Plans for 10 Group 2 MSMEs.
- One-on-one facilitation and coaching support for QMS and business management support.
- Prepare graduation assessments.

- Maintain MSME-level progress documentation.
- Facilitate relevant technical peer learning workshop session(s).
- Sharing and leveraging the value of lessons learned in peer-learning workshops.

Qualifications of Expert 2

- Education/training (2.3.1): university degree (Postgraduate) in agriculture, rural development, Business Management/Administration or relevant other degree.
- Language (2.3.2): C2-level language proficiency in English.
- General professional experience (2.3.3): 5 years of professional experience in training/facilitation/coaching of quality management systems and business management/administration.
- Specific professional experience (2.3.4): 6 years of direct experience implementing or auditing GMP, GHP, GACP, HACCP, ISO or equivalent quality management systems in the food, cosmetics, pharmaceuticals or natural ingredients sectors.
- Leadership/management experience (2.3.5): 3 years of experience managing technical assistance programmes or mentoring portfolios.
- Regional experience (2.3.6): 4 years of experience in projects in Southern Africa.
- Development cooperation (DC) experience (2.3.7): 3 years of experience in DC in emerging economy projects.
- Other (2.3.8): Certification pathways (Organic, Fair Wild, COSMOS, SEDEX, HALAL, KOSHER).

Expert 3

Tasks of Expert 3 – Market Access and Export Readiness Specialist

- Provide relevant light preparatory support on understanding due diligence requirements related to market access and marketing.
- Support the finalisation of the design and facilitation of the Biotrade Marketplace Workshop technical programme (November 2026)
- Prepare the export readiness and market access peer learning session(s);
- Prepare MSMEs for the 3rd ABF (September 2027); provide market access input to Group 1 investment readiness profiles.
- Be the interface between the Micro and Meso level activities identified within the SDPs to ensure aggregation of reoccurring matters to the relevant associations.
- Work alongside SIPPO and its BSOs related to MSME preparation for international trade fairs (e.g. In-Cosmetics, BioFach, SIAL) and export certification requirements.
- Sharing and leveraging the value of lessons learned in peer-learning workshops.

Qualifications of Expert 3

- Education/training (2.4.1): university degree (Postgraduate) in International Trade, Marketing, Business Administration, Economics or a related field.
- Language (2.4.2): C2-level language proficiency in English.

- General professional experience (2.4.3): 8 years of professional experience in export development, trade facilitation, international market access or business development for MSMEs.
- Specific professional experience (2.4.4): 5 years of experience in market access and export readiness support for natural ingredients, food and beverage, cosmetics or related sectors.
- Leadership/management experience (2.4.5): 3 years of experience facilitating multi-stakeholder workshops or training programmes.
- Regional experience (2.4.6): 3 years of experience in projects in Southern Africa.
- Development cooperation (DC) experience (2.4.7): 2 years of experience in DC in emerging economy projects.
- Other (2.4.8): EU export regulatory requirements for end-markets such as cosmetics, food, nutraceuticals, pharma, Flavour and Fragrance.

Expert 4

Tasks of Expert 4 – Web Application Developer

- Review and verify the production-ready web dashboard application package handed over by the BioPANZA MAC management team, and document any defects, gaps or refinements required prior to deployment.
- Ingest the underlying Excel and CSV files into the application database and validate data integrity after ingestion.
- Deploy and host the application in a secure production environment, configuring user access, authentication and role-based permissions in line with the BioPANZA MAC Process Manual and POPIA.
- Operate and maintain the live application throughout the assignment period, including bug fixes, minor enhancements, backups, security patching and version control.
- Integrate the preparation, execution and reporting of Tasks 1 to 8 into the online tool, ensuring all 11 BioPANZA tool processes function end-to-end.
- Configure the reporting and extract functionalities required for quarterly reports, the annual summary report, the final assignment report, BSO extracts and Feedback Reports 1 and 2.
- Provide user training and written documentation to the BioPANZA MAC management team and the service provider team, and hand over the fully functional, documented and hosted application at the end of the assignment.

Qualifications of Expert 4

- Education/training (2.5.1): university degree (Postgraduate) in Computer Science, Software Engineering, Information Systems, Information Technology or a closely related field.
- Language (2.5.2): C2-level language proficiency in English.
- General professional experience (2.5.3): 8 years of professional experience in software development, full-stack web application development or web-based database application development.

- Specific professional experience (2.5.4): 5 years of experience in deploying and maintaining hosted web dashboard applications, including database design and management, data ingestion from Excel and CSV sources, and design and implementation of filtering, grouping and reporting functionalities.
- Leadership/management experience (2.5.5): 2 years of experience leading or coordinating software delivery, including requirements verification, user acceptance testing and technical handover to non-technical client teams.
- Regional experience (2.5.6): 2 years of experience in delivering software or data platform projects for clients based in Southern Africa.
- Development cooperation (DC) experience (2.5.7): 1 year of experience in DC in emerging economy projects.
- Other (2.5.8): demonstrable experience with secure hosting environments, role-based access control, data protection and compliance with POPIA (Act 4 of 2013) or equivalent data protection regulations.

5. Costing requirements

Assignment of personnel and travel expenses

Per diem allowances are reimbursed as a lump sum up to the maximum amounts permissible under tax law for each country as set out in the country table in the circular from the German Federal Ministry of Finance on travel expense remuneration (downloadable from the [German Federal Ministry of Finance – tax treatment of travel expenses and allowances for international business travel as of 1 January 2026 \(GERMAN ONLY\)](#)).

Accommodation allowances are reimbursed as detailed in the specification of inputs below.

With special justification, additional Accommodation costs up to a reasonable amount can be reimbursed against evidence.

All business travel must be agreed in advance by the officer responsible for the project

Sustainability aspects for travel

GIZ has undertaken an obligation 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.

CO₂ emissions caused by air travel must 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/ expert	Total	Comments
Team Lead	1	70	70	The Team Leader could also have expertise listed under either of the 4 experts in addition to being team lead. I.e Team Lead can additionally be one of the 4 Experts, different daily rates will apply
Expert 1	1	55	55	
Expert 2	1	55	55	
Expert 3	1	55	55	
Expert 4	1	55	55	
Travel expenses	Quantity	Number/ expert	Total	Comments
Per-diem allowance in country of assignment (lumpsum)	1	50		R/day – SA Gauteng & Cape Town The per diems shall be split among the Experts, depending on the travel requirements
Overnight allowance in country of assignment (South Africa)	1	50		R/night The overnight shall be split among the Experts, depending on the accommodation requirements
Transport	Quantity	Number/ expert	Total	Comments
Domestic flights	7 return	1		14 single-leg flights (= 7 return flights) within South Africa shall be split among the Experts, depending on the travel requirements
CO ₂ compensation for local air travel	7 return	1	R16,321.20	A fixed budget of R16,321.20 is earmarked for settling carbon offsets against evidence.

Other travel expenses - lumpsum	1	R67,600	R67,600	Use of shuttle, car rental, train, own vehicle kms @R4.95km, fuel, parking, tollgates etc.
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6. Inputs of GIZ or other actors

A number of parallel processes shall be underway under outcome 2 of ABioSA phase III sector-wide initiatives that should be aligned with the relevant SDPs and the seven SDP pillars. The service provider must demonstrate familiarity with the BioPANZA MSME Dashboard, Assessment Reports and Pipeline Management Tool before commencing field activities.

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

- Local workshops, training and meetings shall take place either at the GIZ/ABioSA office, it's partner locations or alternatively be arranged by the GIZ CCPS office or project partners. Costs shall be borne by the project and its partners. The bidders are also encouraged to make use of online training mediums such as webinars and blogs.
- No equipment is foreseen, if necessary, it shall be provided by the project.

7. Data governance and confidentiality

Outsourced processing of personal data

The provisions on data protection and information security of the General Terms and Conditions of Contract apply.

Data protection

Personal data will be processed on behalf of GIZ. 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. If the contractor has already been audited by GIZ in the past, an update in accordance with GDPR must nevertheless be sent. After a positive check, the contract is concluded with the AuV attachment

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 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 ToRs 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.

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.

9. Annexes

The below Annexes shall be shared with the successful bidder during the kick-off meeting.

- BioPANZA MSME pipeline management and referral tool and supporting documents
- Sector Development Plans
- Biotrade Marketplace Workshop Concept Note
- Stakeholder mapping of public and business support organisations
- ABioSA phase III project plan