

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

CONFIDENTIAL

Conducting Training Programme on ISO 14064 (Parts 1, 2 and 3) Carbon Footprint Lead Verifier for Officials of SDAs and SPCBs	Project number/ cost centre: G-018078-001 IO-1807801000 Tender number 10060388
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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
BEE	Bureau of Energy Efficiency
CCTS	Carbon Credit Trading Scheme
GHG	Greenhouse Gas
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH / German Development Cooperation
FK	Expert
FKT	Expert days
KZFK	Short-term expert
ToRs	Terms of reference
MSMEs	Micro, Small and Medium Enterprises
MRV	Monitoring, Reporting and Verification
ISO	International Organization for Standardization
SDA	State Designated Agency
SPCB	State Pollution Control Board
AV	Audio-Visual
DV	Digital Video

1. Context

Brief information on the project

GIZ is an international cooperation enterprise for sustainable development which operates worldwide, on a public benefit basis. GIZ is fully owned by the German Federal Government, GIZ implement development programs in partner country on behalf of the German Government in achieving its development policy objectives.

Energy efficiency the energy efficiency project of GIZ has been working with BEE in the implementation of energy conservation act. The project has supported BEE in many initiatives for large industries and MSMEs. Despite these achievements, substantial untapped potential remains, requiring an expanded policy and adequate instrument mix.

To address this, the Bureau of Energy Efficiency (BEE), under the Ministry of Power, Government of India collaborates with GIZ India on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ) through the project “Energy Efficiency in India” which adopts a comprehensive approach to industrial decarbonisation by strengthening institutional and individual capacities of relevant stakeholders. Its interventions focus on:

- a. Developing strategies for industrial decarbonisation, including integration within the Indian Carbon Market.
- b. Supporting the design and implementation of incentive schemes.
- c. Promoting industrial energy efficiency measures through demonstration projects and awareness campaigns.
- d. Advancing gender equality and social inclusion in the industrial transition.

Background

The implementation of India’s Carbon Credit Trading Scheme (CCTS) and the increasing focus on industrial decarbonization require robust and consistent systems for GHG quantification, reporting, and verification. ISO 14064 provides an internationally recognized framework for GHG accounting and credible MRV. Building the capacity of State Designated Agencies (SDAs) and State Pollution Control Boards (SPCBs) officials will strengthen their ability to assess GHG inventories, validate emission baselines and monitoring reports, and support industries in meeting carbon market requirements. This will help ensure consistent MRV practices and facilitate the effective integration of industries into India’s emerging carbon market.

The primary objective of this assignment is to engage a certified training provider to design and deliver a comprehensive 5-day ISO 14064 (Parts 1, 2 and 3) Lead Verifier Certification Programme for technical officials from SPCBs and SDAs. The programme will equip participants with the technical knowledge and practical skills to quantify, report, and independently verify GHG emissions in accordance with international standards and India’s CCTS MRV requirements.

Key Objectives:

- Build the capacity of SDA and SPCB officials on ISO 14064 and GHG accounting.
- Strengthen understanding of GHG inventory preparation, quantification, and reporting.
- Enhance knowledge and application of MRV requirements under CCTS.
- Enable officials to support industries in GHG reporting and carbon market compliance.
- Develop state-level technical capacity to support industrial decarbonization.
- Conduct training workshops in six cities.

2. Tasks to be performed by the contractor

The contractor is responsible for providing the following services:

- Develop a 5-day detailed training agenda covering ISO standards 14064-1, 14064-2, and 14064-3.
- Include dedicated modules explaining the intersection of ISO 14064 with India's CCTS, supported by industry-specific case studies, calculation exercises, and role-play scenarios for practical learning.
- Identify and secure a premium training venue (minimum 4-star hotel or equivalent institutional facility) suitable for executive training in six cities: Delhi, Mumbai, Kolkata, Bengaluru, Hyderabad, and Guwahati.
- BEE will identify/nominate the officials eligible to participate in the programme. The Contractor shall independently establish the registration process and collect directly from the nominated participants only such personal data as it determines to be necessary for training administration, logistical arrangements, assessment and certification.
- Coordinate independently with nominated SPCB/SDA officials for registration and participation in the training programme. The Contractor shall independently determine the personal data necessary for participant registration, training administration, accommodation, examination and certification, subject to applicable data protection law.
- The contractor shall make sure active participation of the participants throughout the training programme and strive to ensure their satisfaction with the training provided.
- The contractor must supply all educational materials to participants in hard copy.
- Provide all necessary workshop infrastructure, including AV/DV equipment, high-speed internet, stationery, and printed training materials.
- Deploy authorized and globally accredited Lead Trainers to conduct the 5-day interactive training sessions.
- Execute six training programmes, each comprising minimum 25 participants, across six major Indian cities Delhi, Mumbai, Kolkata, Chennai, Bangalore and Guwahati strictly in accordance with the approved curriculum and prescribed daily schedule.
- Ensure the smooth and effective implementation of the activities outlined in the ToR for conducting the training programmes.
- Evaluate participants continuously throughout the program and conduct a final exam at the end. To be deemed successful, a participant must pass this final assessment.
- Evaluate the examination papers systematically and transparently within 15 days of program completion.

- Issue a globally recognized “ISO 14064 Lead Verifier” hard-copy certificate to participants who successfully pass the examination, formally designating them as ISO 14064 Lead Verifiers. Issue "Participation Certificate" to attendees who complete the course but do not meet the minimum passing threshold.
- Upon completion of the training programme, the agency shall submit a comprehensive completion report covering key activities undertaken, training outcomes, materials used, session summaries and overall impact of the programme.

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

Milestones/partial works	Deadline/place/person responsible	Criteria for acceptance
Inception Meeting	Within 1 week of contract award	Detailed work plan, finalized curriculum outline, and proposed venue/accommodation options.
Training Material Finalization	Within 3 weeks of contract award	Submission and approval of all customized presentations, handbooks, and mock exams.
Execution of the 5-Day Training in 3 Cities	Within 16 weeks of contract award	Successful delivery of the ISO 14064 LEAD verifier training session to SPCB and SDA officials.
Execution of the 5-Day Training in remaining 3 Cities	Within 22 weeks of contract award	Successful delivery of the ISO 14064 LEAD verifier training session to SPCB and SDA officials.
Final Completion Report	Within 24 weeks of contract award	Submission of aggregated training and examination outcomes, number of participants successfully certified, number of participation certificates issued, and anonymised/aggregated feedback analysis. No participant-level personal data or individual examination results shall be included in the completion report submitted to GIZ unless specifically required on an appropriate legal basis.

Period of assignment: from **December-2026** until **June-2027**.

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 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 tenderer is required to describe its backstopping concept. The following services are part of the standard backstopping package, which (like ancillary personnel costs) must be factored into the fee schedules of the staff listed in the tender in accordance with Section 3.1 of the GIZ AVB:

- Service-delivery control
- Managing adaptations to changing conditions
- Ensuring the flow of information between the tenderer and GIZ
- Assuming personnel responsibility for the contractor's experts
- Process-oriented steering for implementation of the commission
- Securing the administrative conclusion of the project

Further requirements (1.7)

Eligibility criteria for the consulting firm

- Should be registered in India
- Must be an accredited training provider authorized to issue globally recognized ISO 14064 Lead Verifier certifications
- Average annual turnover for the last 3 financial years should be 150.000 Euros
- Number of employees (as of December last year) should be 5
- Minimum two reference project on training programs related to ISO14064 certification, and one project involving ISO 14064 implementation in GHG accounting. The reference projects should be of more than 25.000 Euros and in last three years
- Around 5 years of experience in capacity-building programs related to carbon markets, GHG accounting, or energy efficiency
- Around 3 years of experience in conducting residential training programmes of minimum 15 participants
- Minimum 3 years work experience in India
- Minimum 1 ODA financed project

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.

(Team Lead/ Lead Expert):

Tasks of the team leader

- Overall responsibility for the successful delivery of the training programme and accommodation logistics.
- Lead the development and customization of the training curriculum in alignment with ISO 14064 and India's CCTS.
- Coordinate with senior SPCB/SDA officials to ensure participation and seamless onboarding.
- Provide a brief introduction during the workshop on the training programme and the work undertaken through the collaboration between the contractor, GIZ, and BEE.
- The Contractor shall independently design, administer and evaluate the final examination in accordance with the requirements of its applicable accreditation/certification framework. GIZ/BEE may define the required subject-matter scope and expected learning outcomes but shall not determine the Contractor's processing of participant assessment data.
- Resolve high-level technical and logistical issues during the 5-day residential programme.
- Grade examination papers and recommend participants for official certification.
- Any other work required to complete the work defined in the ToR

Qualifications of the team leader

- Qualification: : Bachelor's/master's degree in engineering/sciences/Statistics/Economics related discipline (2.1.1)
- Language: Be proficient in Hindi and English (2.1.2)

- General professional experience: 15 years of work experience in the field of GHG validation/verification activities (2.1.3)
- Specific professional experience: 10 years of experience in certification programs, ISO 14064 series and 17029 standard/GHG Protocol/CDM/CCTS (2.1.4)
- Leadership experience: 7 years of experience at leadership positions (2.1.5)
- Regional experience: 7 years of work experience with Indian Ministries (2.1.6)
- Development cooperation experience: 3 years of experience working in Development cooperation projects. (2.1.7)
- Other: Certified Energy Auditor and ISO 14064 standards Lead Verifier (2.1.8)

Expert 1: (Lead Trainer):

Task of expert 1:

- Deliver extensive, interactive classroom sessions covering ISO 14064-1 (Organization level), ISO 14064-2 (Project level), and ISO 14064-3 (Verification and Validation).
- Develop Indian industry-specific case studies, GHG quantification exercises, and mock-audit scenarios for hands-on learning.
- Design the final proctored examination to accurately evaluate the competence of participating officials.
- Grade examination papers and recommend participants for official certification.
- Any other work required to complete the work defined in the ToR

Qualifications of expert 1

- Qualification: Bachelor's/master's degree in engineering/sciences/Statistics/Economics or related discipline (2.2.1)
- Language: Be proficient in Hindi and English (2.2.2)
- General professional experience: 10 years of work experience in the field of GHG Accounting and Protocols (2.2.3)
- Specific professional experience: 7 years of experience of conducting training in GHG accounting/environmental auditing/CDM and other Voluntary Carbon Mechanisms and ISO 14064-1,2 & 3 (2.2.4)
- Leadership experience: not required (2.2.5)
- Regional experience: 5 years of working in the India (2.2.6)
- Development cooperation experience: not required (2.2.7)
- Other: ISO 14064 standards Lead Verifier (2.2.8)

Expert 2: (Co-Trainer):

Task of expert 2:

- Deliver extensive, interactive classroom sessions covering ISO 14064-1 (Organization level), ISO 14064-2 (Project level), and ISO 14064-3 (Verification and Validation).
- Develop Indian industry-specific case studies, GHG quantification exercises, and mock-audit scenarios for hands-on learning.
- Lead the logistical support and task related to the workshop management.
- Execute six ISO 14064-training programme successfully
- Any other work required to complete the work defined in the ToR

Qualifications of expert 2

- Qualification: Bachelor's/Master's degree in Engineering, Environmental Management, Sustainability, Energy, or related discipline (2.3.1)
- Language: Be proficient in Hindi and English (2.3.2)
- General professional experience: 10 years of work experience in the field of GHG Accounting and Protocols (2.3.3)
- Specific professional experience: 7 years of experience of conducting training in GHG accounting/environmental auditing/CDM and other Voluntary Carbon Mechanisms and ISO 14064-1,2 & 3 (2.3.4)
- Leadership experience: not required (2.3.5)
- Regional experience: 5 years of experience working in the India (2.3.6)
- Development cooperation experience: not required (2.3.7)
- Other: ISO 14064 standards Lead Verifier (2.3.8)

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

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. Travel under this assignment is expected to these states: (Punjab Maharashtra, Jharkhand, Tamil Nadu, Kerala, Gujrat, Karnataka and Haryana etc.), travel to any other location would be taken with prior approval from GIZ

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 per expert	Total	Comments
Expert 1: (Team Lead)	1	33	33	
Expert 2: (Lead Trainer)	1	68	68	
Expert 3: (Co-Trainer)	1	68	68	
Travel expenses	Quantity	Number per expert	Total	Comments
Per-diem allowance in country of assignment	32	3	96	Two trainer experts per Trainings for 6 days, one team lead for 2 days per Trainings for 6 nights for total 6 Training programs (6 trips x 6 days x 2 experts + 6 trips x 2 days x 1 team lead)
Overnight allowance in country of assignment	6 training programmes	153	816	Two trainer experts per Trainings for 5 nights, one team lead for 1 night per Training for 6 nights, 25 participants for 5 nights for total 6 Training programs (6 trips x 5 nights x 2 experts + 6 trips x 1 night x 1 team lead + 25 participants per programme x 5 nights x 6 programs)
Transport	Quantity	Number per expert	Total	Comments
Domestic flights	6	3	18	(6 round trips for six training programs for 3 experts)
CO ₂ compensation for air travel Link to working aid and table for determining the budget and Guidance for GIZ service	6	3	18	(6 round trips for six training programs for 3 experts). CO ₂ compensation for air travel round trip is consider as

<u>providers on avoiding, reducing and offsetting GHG emissions on setting the budget.</u>				22.51 EUR for 18 trips i.e. EUR 405.
Travel expenses (train, car) Local travel	6 training programmes	153	336	Local transportation for each experts and attendees within city where training programme will be scheduled. (6 trips x 3 experts x 2 + 25 Pax x 6 programmes x 2times onboarding/deboarding)
Other costs	Number	Price	Total	Comments
Trainings Training cost	6		6	6 training programmes x 25 participants including venue, Food, Water, Tea/Coffee, AV/DV setup, and Stationary in the workshops
Training Material Cost*	150		150	The fees shall be inclusive of only training modules/kits and physical certificates.

**The Training Material cost shall cover only the training modules/kits and physical certificates. Trainer costs shall be included under the Expert Fees, as specified in the table above.*

Workshops, events and trainings

The tenderer shall organise 6 training workshops covering all logistic costs. Venue should be minimum 4-star hotel. The logistic cost should be inclusive of - venue, Food, Water, Tea/Coffee, AV/DV setup, and Stationary in the workshops. The cost of the workshop shall be reimbursed as per actuals.

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 20 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. The CVs can also be submitted in English (language).

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.

7. Data Protection and Information Security

Data Protection

The provisions on data protection and information security of the current version of GIZ's General Terms and Conditions Of Contract (sections 1.7. Confidentiality and I. 11 Data protection) apply.

The performance of the contract may be associated with the processing of personal data by the contractor, such as (but not limited to) names and contact information. In such cases, the contractor shall act as an independent DATA CONTROLLER and must alone comply with ALL applicable data protection obligations, including those stemming from regional and local laws. The contractor shall process personal data only when a given goal cannot be reasonably attained without such data. The data protection principles such as lawfulness, data minimization, accuracy, purpose limitation, storage limitation, transparency, integrity and confidentiality, and accountability, as well as the numerous rights of the data subject must be paid due attention. GIZ is NOT in any way responsible for such processing.

In cases where the contractor follows the instructions of a GIZ partner, the partner is the data controller. The laws and standards applicable to it and the contractor must be complied with and implemented.

If the Contractor is not subject to the GDPR and the applicable laws do not contain any explanations of the data protection principles and rights mentioned here, the definitions of the GDPR (Regulation (EU) 2016/679) should be used."

Compliance with applicable Indian data protection law

- Where the Contractor processes digital personal data to which Indian data protection law applies, the Contractor shall comply with the Digital Personal Data Protection Act, 2023, the Digital Personal Data Protection Rules, 2025, and other applicable rules, notifications and requirements thereunder, in each case to the extent in force and applicable during the performance of the contract. Where consent is relied upon as the legal basis for processing, the Contractor shall ensure that consent is free, specific, informed, unconditional and unambiguous and is obtained through a clear affirmative action. Data principals shall be provided with an easily accessible mechanism to withdraw consent at any time, and such withdrawal shall be given effect as soon as reasonably practicable. The Contractor shall provide appropriate privacy notices, facilitate the exercise of data principal rights, implement reasonable security safeguards, and ensure the deletion of personal data once the purpose for which it was collected has been fulfilled, unless retention is required by applicable law.
- The Contractor shall independently manage any disclosure of personal data to hotels, transport providers and other service providers necessary for delivery of the training

programme and shall ensure that such disclosure complies with applicable data protection requirements and is limited to data necessary for the respective purpose.

- The Contractor, in its capacity as independent data controller, shall be responsible for determining the applicable lawful basis, providing the required privacy notice directly to data subjects, responding to data-subject/data-principal requests and establishing appropriate retention and deletion periods in accordance with applicable law.

8. Information Security

The Contractor shall implement appropriate technical and organisational measures to protect information and personal data processed under the assignment against accidental or unlawful destruction, loss, alteration, unauthorised disclosure or access.

At a minimum, the Contractor shall ensure:

- access to participant information, assessment records and other confidential information is restricted to personnel requiring such access for performance of the contract;
- appropriate authentication and access-control measures are applied to systems used to process or store such information;
- personal or confidential information transmitted electronically is protected using appropriate secure transmission mechanisms;
- personal and confidential information is not stored or transferred using unauthorised personal accounts, devices or file-sharing services;
- subcontractors and service providers receiving personal data are subject to appropriate confidentiality, data-protection and information-security obligations;
- personal data and confidential information are securely deleted or returned when no longer required for the contractual purpose, subject to applicable statutory retention requirements; and
- any actual or suspected information-security or personal-data incident relating to the assignment is reported to GIZ without undue delay in accordance with applicable contractual requirements.