

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

<b>Indo-German Energy Programme - Promotion of Solar Water Pumps (IGEN – PSWP): Terms of Reference (TOR) to identify a firm or consortium of firms or experts to provide support for carrying out training and capacity building of financiers on PM-KUSUM Component B</b>	<b>Project number/ cost centre: 16.2081.4-001.00</b>
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## 0. List of abbreviations

AVB	General Terms and Conditions of Contract (AVB) for supplying services and work 2022
BMZ	Federal Ministry for Economic Co-operation and Development, Germany
FAQ	Frequently asked Questions
FI	Financial Institution
IGEN PSWP	Indo German Energy Programme-Promotion of Solar Water Pumps
PM-KUSUM	Pradhan Mantri Kisan Urja Suraksha evam Utthan Mahabhiyan
MNRE	Ministry of New and Renewable Energy
MFI	Micro Finance Institution
RRB	Regional Rural Bank
SFB	Small Finance Bank
NBFC	Non-Banking Financial Corporation
ToR	Terms of Reference
CV	Curriculum Vitae
SIP	Solar Irrigation Pump
SLBC	State Level Banker's Committee
BFSI	Banking, Financial Services and Insurance
UP	Uttar Pradesh

## 1. Context

### Programme Introduction

The Promotion of Solar Water Pumps component of the Indo-German Energy Programme (hereafter referred to as programme) is a bilateral technical co-operation measure between the Federal Ministry for Economic Co-operation and Development (BMZ), Germany and the Ministry of New and Renewable Energy (MNRE), Government of India. BMZ has commissioned Gesellschaft für Internationale Zusammenarbeit GmbH (GIZ), a federal enterprise based in Eschborn and Bonn, Germany with the implementation of the project.

The PSWP module aims to improve, expand and speed up the roll-out of sustainable solar water pumps. The objective is to ensure that solar pumps for productive use are rolled out more rapidly through a multi-level and multi-actor approach. The project provides advisory services to the central government (such as MNRE) at the national level. In select federal states, it actively relevant government agencies (such as state implementing agencies), agricultural involves extension services, and financial service providers. The project also accounts for the key role played by the private sector (companies and associations) by entering into specific cooperation arrangements.

The project engages in four specific fields of activity:

- (i) Promotion of an enabling policy environment,
- (ii) Implementing successful business, operator, and service models
- (iii) Facilitating access to finance, and
- (iv) Capacity building of agricultural service providers.

Pradhan Mantri Kisan Urja Suraksha evam Utthan Mahabhiyan ([PM KUSUM](#)) scheme is being implemented in the entire country for improving irrigation facilities in agriculture fields through the use of solar water pumps with an aim to improve farmer's income. The scheme targets to install 30.8 GW of solar capacity by 2026 in the entire country. The scheme has 3 components:

- Component-A: Setting up of 10,000 MW of Decentralized Ground/ Stilt Mounted Grid Connected Solar or other Renewable Energy-based Power Plants;
- Component-B: Installation of 2 million Stand-alone Solar Agriculture Pumps; and
- Component-C: Solarisation of 1.5 million Grid Connected Agriculture Pumps Under

In the Components B & C of PM-KUSUM, the farmer/end-user is expected to contribute up to 40% of the cost of the Solar Irrigation Pump (SIP) as the end-user contribution. While 10% of the project cost has to be contributed by end-user directly, the remaining 30% could be availed as a loan from Financial Institutions (FIs). Thus, access to finance from FIs is the crucial aspect for the success of the scheme.

### Access to Finance & Need for Training of Financiers

It is observed that there is a lack of awareness of the scheme amongst officials in the banking and finance sector. Most FI officials may not be fully aware of the scheme, and even those who are aware are often not knowledgeable of the technical and procedural aspects involved in the financing of SIPs.

Regardless of several initiatives and installations carried out by a multitude of organizations, it has been observed that unlocking finance for SIP applications from FIs and leveraging funds from existing schemes and programs remains a challenge for the end users and field implementation organisations. For example, most FIs have also not been able to benefit from the risk-mitigation facility, and access to capital that the convergence of the PM-KUSUM

scheme with other Government schemes such as [National Agriculture Infra Financing Facility](#) has brought in.

To facilitate the implementation of PM-KUSUM as well as to support the long-term sustainability of solar-powered irrigation in the country, the critical bottle neck of end user financing needs to be eased. In our effort to unlock finance together with financiers, a significant need of creating an awareness-cum-learning program for its officials on financing SIPs – was identified. Considering the above need of training and capacity building, GIZ has developed training content on PM KUSUM (Components A, B and C) and further developed it in the form of an electronic-Learning Management System (e-LMS) module.

## 2. Tasks to be performed by the contractor

### 2.1 Objective & Outline of Tasks

#### Objective:

GIZ is seeking the services of a specialized firm, consortium of firms or a consortium of experts (hereinafter referred as “the bidder”) to provide support to a leading public sector bank (hereinafter referred as “**Bank**”) in carrying out trainings for its officials on the component-B of the PM KUSUM Scheme. The support to the **Bank** is aimed towards:

- a. Carrying out in-person trainings for **Bank** officials from a leading public sector bank at select locations of the **bank’s** training institutes located in North India.
- b. The in-person trainings, should be carried out based on pre-developed content focussed on the Component B of the PM KUSUM Scheme.
- c. In addition to the above tasks, the bidder is expected to support GIZ India in identifying, approaching, and training 100 officials of FIs (from but not limited to Nationalized banks, Private Banks, Regional Rural Banks, Co-operative banks, Small Finance Banks, NBFCs and Micro Finance Institutions) via the e-LMS developed on the overall PM KUSUM Scheme (Components A, B and C).

#### 2.1.1 Work Package I: Implementation of In-Person Trainings for **Bank** Officials on PM KUSUM Component B

##### *Training Content & Delivery*

- In cognizance of the training and capacity building needs amongst financiers, especially with regards to the PM KUSUM Scheme, GIZ with technical inputs from MNRE, has developed training content across all of PM KUSUM scheme’s components A, B and C.
- The bidder is expected to modify and customize the pre-existing training content on Component-B, considering the target audience (financiers) and the larger agri-finance landscape in which they operate. An overview of the pre-existing content has been provided in Annexure-II.
- The primary expectation from the bidder is to use necessary and appropriate training tools (for ex. presentations, group activities, handouts/leaflets, case studies, FAQs) to give shape and form to the pre-existing training content with an aim make the training more creative, attractive, and effective. Appropriate training tools need to be selected and designed based on the existing content provided to the bidder.
- The training delivery mechanism should be designed in a way that the information imparted to the participants is precise, interesting, engaging, and relevant. The way in which the content is delivered to the participants is of prime importance and finalization of the same will have to be done by the bidder in joint consultation with the **Bank** and GIZ.

- The training should be designed with the objective of sensitizing financiers about the broad objectives and specific component of the PM KUSUM Scheme. Post undergoing the training, the financiers should feel supported in extending loans towards the specific component (B) of the scheme.
- The training delivery should be done in a gender sensitive manner. The content should be neutral of gender, religion, ethnicity and geography.
- The final delivery-ready training content developed during this project will be a joint property of the **Bank** and GIZ India. Any change in the content or agreed delivery methods will have to be done by the bidder jointly in consultation with the **Bank** and GIZ. Bidder may not use the content in any other trainings organized outside the scope of this project.

#### *Structure*

- The bidder will be entrusted with the task of carrying out in-person trainings for officials of a leading public sector bank.
- The main target participants of this training will be officials from the **Bank** working in the agri-credit centres, agri-development branches and agri-intensive branches where large volume of agri-loans are processed.
- The trainings should be carried out by the bidder as per the schedule provided in Annexure-I, within the **Bank's** designated training institutes located over select locations in North India (i.e. Gurugram-Haryana, Dehradun-Uttarakhand, Noida and Agra-Uttar Pradesh).
- The training will be 1-day long non-residential training, with approximately 3 sessions spread over 6 hours per day. English will be the preferred mode of delivery of the training content. Knowledge of Hindi language, especially for the personnel imparting the training is essential.
- The plan outlined in Annexure-I is tentative. Bidder is expected to be flexible with regards to the training plan provided as the same may change, albeit to a small extent, in line with availability of bankers.

#### *Post Training Activities*

- Bidder is expected to develop and administer a post-training evaluation, on the basis of content shared during the training, to assess the participant's understanding of PM KUSUM Component B. This evaluation framework should be developed jointly in consultation with the **Bank** and GIZ.
- After completion of the training, a 'Certificate of Completion' should be issued to participants who have successfully passed the post training evaluation.
- Bidder should also develop and take feedback to evaluate participants' perception of but not limited to the training, delivery, content, its effectiveness and potential areas of improvement.
- Bidder should keep an account of the number of participants, maintain data on participants attendance at all the training sessions
- On the completion of all the training sessions for the bank officials, the bidder should submit a post training analysis of the performance of trainees in the evaluation and feedback of trainees on the sessions.

#### 2.1.2 Work Package II: Support to Maximize Outreach for e-LMS on overall PM KUSUM Scheme

- In our various discussions and consultations with financiers to unlock finance, a significant need of creating an awareness-cum-learning program for bank officials on financing SIPs – was identified.

- Consequently, GIZ has developed training content on overall PM KUSUM Scheme (Components A, B and C) in the form of a 2-hour electronic-Learning Management System (e-LMS) module with technical inputs from MNRE.
- The bidder is expected to support GIZ India in identifying, approaching, convincing officials (from but not limited to Nationalized banks, Private Banks, Regional Rural Banks, Co-operative banks, Small Finance Banks, NBFCs and Micro Finance Institutions) to undergo training using the e-LMS leading to completion of training for 100 FI officials.
- To achieve this, the bidder is expected to identify and implement at least two different avenues of marketing and advertising the e-LMS amongst the target group. The bidder should support in marketing of e-LMS on at least two digital platforms which are regularly accessed by the target group.
- The bidder should engage various intermediary agencies, consortia, personnel and other organizations to disseminate the e-LMS and maximize outreach. With the same efforts, bidder should market the e-LMS with the SLBC in at least three states in India which hold significance in the context of the PM KUSUM Scheme (to be decided in consultation with GIZ).
- The bidder should support GIZ via at least two outreach meetings with senior leadership at FIs, which are well positioned within appropriate departments, in an effort to maximize the reach of the eLMS.
- The bidder is expected to work with FIs and FIs/banker training institutions positioned both at the national and organizational (bank specific) level to incorporate the e-LMS into the ongoing training schedule of at least one FI.

## 2.2 Deliverables

### I. Primary Deliverables:

- Delivery of in-person trainings for representatives of a leading public sector bank based on pre-existing content developed on Component B of PM KUSUM Scheme, in line with schedule provided in Annexure -I in joint consultation with the **Bank** and GIZ.
- The bidder will be expected to submit the participant lists and report on results of the post-training evaluation clearly indicating the number of participants in the session and the number of participants which have passed the post-training evaluation.
- Successful marketing of e-LMS training module via appropriate platforms leading to the completion of training for 100<sup>1</sup> financiers (individuals), on PM KUSUM scheme via the e-LMS module:
  - Disseminate the e-LMS training module with the SLBC in at least three states in India which hold significance in the context of the PM KUSUM Scheme
  - Support in outreach meetings with senior leadership from at least two (different) FIs/banks to maximize the reach of the eLMS training module
  - Incorporation and acceptance of the e-LMS into the ongoing training schedule of at least one FI either through its in-house training centres or via nationalized banker training institutions

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<sup>1</sup> Note: The 100 financiers trained via the e-LMS (digital/online) learning module should be over and above and in addition to **Bank** representatives trained via the in-person trainings.

## II. Documentation and Issuance of Certificate:

- A certificate of completion should be issued to all participants who have successfully passed the post training evaluation. The designing of the certificate should be done in consultation with the **Bank** and GIZ.
- Report containing a brief analysis of the post training evaluation administered to the participants containing insights regarding but not limited to identification of areas/subjects/topics which may require a deeper immersion (Word document, maximum 2-3 Pages)
- Report containing a brief analysis of the post training feedback received from participants containing but not limited to specific details highlighted in section 2.1.1 above (Word document, maximum 2-3 Pages)

*The language, representation of the deliverables should be gender sensitive and various steps taken for making the efforts more gender inclusive should be highlighted clearly.*

## 2.3 Assignment Period

The expected duration of the project is 10 months from the date of signing contract. We are expecting that the training to participants from the **Bank** will be done over an 8-month period.

Work packages (as mentioned above), are to be achieved by certain periods during the contract term and are indicated in the table below:

No	Milestones	Timeline
1	Inception meeting organized and report submitted to GIZ.	Within two weeks of contract signing
	Project Monitoring Sheet (PMS) updated in consultation with GIZ.	
Milestones for Work Package I		
2	Finalization of delivery-ready training content (incl. evaluation framework and feedback)	Within 1 month of contract signing
3	Training delivery	1 <sup>st</sup> or 2 <sup>nd</sup> month onwards
4	Completion of Post-Training Activities including analysis of trainee evaluations and trainee feedback	1 <sup>st</sup> or 2 <sup>nd</sup> month onwards
Milestones for Work Package II		
5	Maximizing outreach of the e-LMS module on overall PM KUSUM Scheme (Components A, B and C) to train 100 bankers from FIs:  ➤ Marketing of e-LMS training module with SLBC in at least three states  ➤ Two outreach meetings with senior leadership at banks	1 <sup>st</sup> month onwards

	➤ Incorporation of e-LMS into the ongoing training schedule of at least one FI through bank specific and nationalized banker training institutes	
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*GIZ may also require the organization to prepare short reports / discussion papers / minutes of meeting from time to time or as requested by MNRE.*

## 2.4 Communication Products

### 2.4.1 Detail of Products & Materials

The bidder is expected to submit the following documents. Before submission of final product, GIZ expects a well-articulated and detailed methodology to carry out the designing assignment along with the outline, required framework and timeline for submission of final output.

- A brief analysis of the post training evaluation administered to the participants containing insights regarding but not limited to identification of areas/specific subjects which may require a deeper immersion (Word document, maximum 2-3 Pages)
- A brief analysis of the post training feedback received from participants on the points highlighted in the section 2.1.1 above (Word document, maximum 2-3 Pages)

Bidders are encouraged to make use of (physical) training material while conducting the trainings. The document(s) used should be clear and well-articulated, designing of which can be done in joint consultation with the **Bank** and GIZ. Further, bidder is expected to issue certificates of completion to all the participants who have passed the post-training evaluation.

### 2.4.2 Format

- The bidder must submit well designed and high-quality product in print ready format to GIZ. While designing the documents, the bidder must ensure that GIZ corporate design guidelines are followed consistently (corporate design will be shared with selected bidder) throughout the document, if applicable.
- The content of the documents should be well-edited including language, layout, formatting, typeset. The documents should have cover page/title page, imprint page, acknowledgement and disclaimer for the data collected, photos with caption, list of acronyms and table of contents.
- The final product/documents would belong to GIZ only and hence GIZ logo should be used throughout the document following GIZ communication guidelines (will be shared with selected bidder). In certain cases, GIZ may also request the bidder to share the communication product(s) in the GIZ template. Bidder should avoid using their own logos and its corporate communication/content.

### 2.4.3 Consent forms

- Before taking photos during the assignment, the bidder must ensure that the GIZ consent forms (for everyone appearing in the photos) are filled and signed by individuals and by the guardians in case photos are taken for children.
- The consent forms should be submitted to GIZ with the final deliverables.



#### 2.4.4 Copyrights

- All deliverables, products, materials developed under this assignment shall be the sole property of GIZ and should not be used or shared for any other purpose with others by bidder. GIZ holds an unlimited copyright to all produced material and assets. The bidder shall ensure that GIZ's copyrights are always respected and followed. The bidder shall be responsible for obtaining necessary permissions/license/royalties for any material used unless provided by the project.

### 2.5 Program Steering & Reporting

- The bidder / consultant firm will report to a Technical Expert (to be nominated) from the IGEN-PSWP programme. The bidder / consultant firm is to designate a team leader.
- The bidder / consultant firm will be required to closely work with the established Project Monitoring Unit and attend meetings called by the **Bank**, central and/or state government apart from regular update meetings with GIZ.
- During the period of assignment, the bidder is expected to report on quarterly basis regarding the progress on the assignment. The bidder is expected to develop a Project Monitoring Sheet (PMS) for regular tracking of progress made on the assignment. GIZ may also require the bidder to prepare short reports/concept notes/discussion papers from time to time or as requested by MNRE.
- The bidder will develop necessary factsheet(s) on project, process, and products (interim and final). The parameters and template will be developed in consultation with GIZ.
- The bidder is expected to develop a detailed monitoring mechanism to explain how the bidder will achieve the desired impact sustainably.

### 3. Concept

In the bid, the bidder is required to show how the objectives defined in Chapter 2 are to be achieved, if applicable under consideration of further specific method-related requirements (technical-methodological concept). In addition, the bidder must describe the project management system for service provision.

#### 3.1 Technical-methodological concept

The bidder is required to consider the tasks to be performed with reference to the objectives of the services put out to tender (see Chapter 1). Following this, the bidder presents and justifies the **strategy** with which it intends to provide the services for which it is responsible (see Chapter 2).

The bidder is required to present the actors relevant for the services for which it is responsible and describe the **cooperation** with them.

The bidder is required to present and explain its approach to **steering** the measures with the project partners and its contribution to the results-based monitoring system.

The bidder is required to describe the key **processes** for the services for which it is responsible and create a schedule that describes how the services according to Chapter 2 are to be provided. In particular, the bidder is required to describe the necessary work steps and, if

applicable, take account of the milestones and contributions of other actors in accordance with Chapter 2.

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

The bidder, in their technical proposal should explain the **approach and methodology**, adopted to perform the key activities explained above. Along with the details above the bidder is also required to **address the following questions** within their technical proposal. The bidder in the technical **proposal must answer each of the questions, failing which, it may lead to disqualification**:

1. a. Based on your understanding of the task for providing in-person trainings on PM KUSUM Component-B, please identify and provide a rationale for three tools you would employ to make the trainings more effective and engaging for the target audience (primarily an on-the-job refresher program for working professional financiers)?  
b. What and how different your training approach would be, while implementing these trainings for rural bankers / agricultural loan officers of the **Bank** ? Please support your approach with a rationale.
2. Based on your understanding, while implementing the tasks outlined in above sections, please list and elaborate 3-4 potential risks & mitigants.
3. What would be your approach, other than the modes mentioned in section above, to train 100<sup>2</sup> financiers through e-LMS (online / digital) training module on PM KUSUM Scheme. In case of a requirement to reach out to more than 100 financiers (individuals), what would be your specific approach for incorporation of e-LMS with FIs for the long term?
4. In the process of marketing and advertising the e-LMS training module on PM KUSUM scheme, apart from banks, which are some of the other organizations/institutions you will mobilize to complete the task at hand ?

### 3.2 Project management of the contractor

The bidder is required to explain in its proposal about the project management plan, approach, and procedure for coordination with the GIZ project. This will include the task to be performed by the proposed experts, description of work steps, expert's man-months, backstopping strategy (including the administrative and technical backstopper).

The bidder is responsible for selecting, preparing, training and steering the experts (international and national, short and long term) assigned to perform the advisory tasks.

The bidder will manage costs and expenditures, accounting processes and invoicing in line with the requirements of GIZ.

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<sup>2</sup> Question should be answered on the basis that 100 financiers trained via the e-LMS (digital/online) learning module are over and above and in addition to **Bank** representatives trained via the in-person trainings.

The bidder reports regularly to GIZ in accordance with the AVB of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH.

#### **4. Criteria for Eligibility of firms**

Note: Bidders have to submit the documentary evidence for the criteria specified below.

1. The primary bidder should have a minimum of 5 years of experience in imparting trainings, skilling and capacity building for financiers from Financial Institutions (including but not limited to Nationalized banks, Private Banks, Regional Rural Banks, Co-operative banks, Small Finance Banks, NBFCs and Micro Finance Institutions). *Bidder is expected to provide at least three reference projects in the same regard with a detail on the number of financiers trained.*
2. Primary bidder should demonstrate experience in implementation of trainings with specialization in the areas of (including but not limited to) climate change management and finance, rural/agricultural finance, financial inclusion, solar irrigation, renewable energy, rural livelihoods. In the proposal, Bidder/FI should clearly indicate and provide evidence of implementing such trainings. *Bidder is expected to provide at least two reference projects in the same regard.*
3. Bidder should identify team which is well versed in English and Hindi language such that there is clarity in communication and which can support quick resolution of participant queries.
4. Successful completion of at least two projects (each larger than 15,000 Euro or equivalent) demonstrating implementation of trainings for financiers within last 5 years. *Bidder is expected to provide a reference of these projects in the proposal.*
5. Bidder should provide adequate evidence in the proposal to demonstrate a working relationship with FIs, banks, banker associations, conglomerates in the BFSI sector to exhibit experience in carrying out PR/communications exercise with relevant institutions for banker/financier outreach.
6. The bidding organizations require an average annual turnover of 110,000 EURO or equivalent over the last three financial years and must have employed, as on 31 December of previous year, at least 5 persons. In case of a consortium, the lead agency should meet the stated criteria.
7. Experience of working on development projects with bilateral or multi-lateral international cooperation, financed by ODA will be preferred.

Bidder may jointly bid as a consortium. In case they do, the following documents should be shared for reference:

- Declaration of consortium: Submit letter of partnership (interest / intent) to partner with lead organisation, roles and responsibility of proposed partnership should be clearly mentioned along with required documents.

If the bidder forms a consortium, then they must provide the signed agreements/letter from the consortium partners highlighting their willingness to collaborate. The roles and responsibility of the consortium partners should be clearly mentioned in the proposal.

**Financial Institutions** (including but not limited to Nationalized banks, Private Banks, Regional Rural Banks, Co-operative banks, Small Finance Banks, NBFCs and Micro Finance Institutions) **which meet the eligibility criteria are encouraged to apply directly or jointly in a consortium as well.** Financial institution(s) should be such that they have previously imparted trainings to other financiers on the aforementioned subjects (Chapter 4, point 2). *Bidder, if a financial institution, is expected to provide evidence (in the form of projects or otherwise) wherein bidder can demonstrate experience of implementing trainings in the subject areas of areas of (including but not limited to) climate change management and finance, rural/agricultural finance, financial inclusion, solar irrigation, renewable energy, rural livelihoods.*

**Important Note:** In the proposal, it is essential that the bidder answer all questions listed in section 3.1 of the document. Response to these questions will have significant impact on the technical evaluation of the proposal. In addition to this, during the evaluation, bidder may be asked to make a mock-presentation as a demonstration of training skills.

#### **4A. Personnel concept**

The bidder 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. **The bidder should provide relevant documents to demonstrate the below mentioned skill sets.**

The roles and responsibilities of each of the project personnel should be clearly defined, well explained and understood in the proposal and should cover all major tasks outlined in the work packages.

The bidder is required to draw up a **personnel assignment plan** with explanatory notes that lists all the experts proposed in the bid; 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.

##### **I. Team Leader (1 Nos.)**

###### Tasks

- Overall responsibility for the advisory packages of the contractor (leading the team, provide guidance, responsible for the quality of the deliverables and deadlines)
- Coordinating and ensuring communication with GIZ, **Bank** and other relevant stakeholders
- Personnel management as well as planning and steering assignments and supporting the trainers and communications expert.
- The Team Leader should support the Trainers in modifying and customizing pre-existing content, mindful of the needs of the target participants.
- The Team Leader should support in designing the training content in a way to sensitize financiers about the PM KUSUM Scheme in general and about the PM KUSUM Component B, specifically. The content should be designed in a way that financiers

feel aware and supported while extending loans to borrowers keen to adopt SIPs under PM KUSUM Component B.

- Depending on the training design, it may be required for the Team Leader to engage with the participants from time to time during the trainings.
- The team Leader will be responsible for the overall design and implementation of the in-person trainings for the **Bank** along with contribution of their subject matter expertise to the task. Monitoring and steering of outreach efforts for the e-LMS, as outlined in work packages above, should be done by the Term Leader too.
- Experience of developing and implementing trainings for financiers along with knowledge about the solar irrigation/agriculture sector in India will be preferred
- The Team Leader will be responsible for providing quality deliverables to GIZ and meeting milestones within the stipulated timeframe as mentioned in the earlier sections of this ToR.

#### Qualifications of the Team Leader

Parameter	Reference*	Details
Qualification	2.1.1	<ul style="list-style-type: none"> <li>• Master's degree in relevant field of the core subject matter either pertaining to finance/agricultural finance/climate change/rural financing/ financial inclusion/ solar irrigation/ renewable energy finance/ energy or public finance/international development and finance</li> </ul>
Language	2.1.2	<ul style="list-style-type: none"> <li>• Good business language skills in English. Knowledge of Hindi is essential.</li> </ul>
General professional experience	2.1.3	<ul style="list-style-type: none"> <li>• At least 8 years of professional experience in designing, developing and implementation of trainings, skill building and/or capacity building for financiers (from but not limited to Financial Institutions such as Nationalized banks, Private Banks, Regional Rural Banks, Co-operative banks, Small Finance Banks, NBFCs and Micro Finance Institutions, Development Finance Institutions)</li> </ul>
Specific professional experience	2.1.4	<ul style="list-style-type: none"> <li>• 5 years of experience in designing, developing and implementation of trainings, skill building and capacity building for financiers in subjects pertaining to rural banking/financial inclusion/agri-business/climate change/energy (please provide at least 2 previous relevant project descriptions and/or references)</li> </ul>
Leadership/management experience	2.1.5	<ul style="list-style-type: none"> <li>• 4 years of management/leadership experience as project team leader or manager (please provide at least 2 previous relevant project descriptions and/or references)</li> <li>• Experience in managing teams with a mix of national and local expertise, scheduling and managing deliverables, costing and status reporting</li> </ul>

ODA / Development cooperation experience	2.1.7	<ul style="list-style-type: none"> <li>• Experience of managing ODA financed project and quality protocol of international development agencies</li> </ul>
Other	2.1.8	<ul style="list-style-type: none"> <li>• Having an understanding of the solar irrigation market in India with insights about agriculture sector, agricultural finance</li> <li>• Having an understanding and knowledge of rural banking and finance, associated financial products and loan appraisal processes</li> <li>• Having a strong and clear access and inroads into networks of bankers and financiers and/or BFSI community</li> <li>• Having an understanding of policy, finance, technological and coordination related aspects of RE technologies in solar irrigation is an added advantage</li> <li>• An understanding of the agricultural sector in terms of structural challenges and complexities of the water-energy-food nexus is an added advantage</li> <li>• Flexible and able to multitask; having good communication skills, can work within an agile, uncertain and fast-moving environment, while also driving toward clarity and solutions; demonstrating resourcefulness in setting priorities.</li> </ul>

*\*Reference to technical assessment grid*

## II. Trainer (2 Nos., Expert 1)

### Tasks

- Support in the designing and implementation of the trainings on PM KUSUM Component B
- Identify and incorporate specific tools to make the training content attractive, engaging and relevant for the target participants
- Coordinate between GIZ and **Bank** to ensure trainings are implemented smoothly, in line with the **Bank's** requirements and within the agreed framework.
- Support in providing GIZ with necessary evidence of completion of trainings
- Support the team leader in all activities and contribute towards timely achievement of deliverables

### Qualifications of Trainers

Parameter	Reference*	Details
Qualification	2.2.1	<ul style="list-style-type: none"> <li>• Master's degree in relevant field of the core subject matter either pertaining to finance/agricultural finance/climate change/rural financing/ financial inclusion/ solar irrigation</li> </ul>
Language	2.2.2	<ul style="list-style-type: none"> <li>• Good language skills in English and Hindi for effective communication with the target participants</li> </ul>

General professional experience	2.2.3	<ul style="list-style-type: none"> <li>At least 5 years of professional experience in designing, developing and implementation of trainings, skill building and/or capacity building for financiers (from but not limited to Financial Institutions such as Nationalized banks, Private Banks, Regional Rural Banks, Co-operative banks, Small Finance Banks, NBFCs and Micro Finance Institutions, Development Finance Institutions)</li> </ul>
Specific professional experience	2.2.4	<ul style="list-style-type: none"> <li>At least 3 years of experience in designing, developing and implementation of trainings, skill building and capacity building for financiers in subjects pertaining to rural banking/financial inclusion/agri-business/climate change/energy (please provide at least 2 previous relevant project descriptions and/or references)</li> </ul>
Other	2.2.8	<ul style="list-style-type: none"> <li>Having a deep understanding of the solar irrigation market in India with insights about agriculture sector, agricultural finance</li> <li>Having an understanding and knowledge of rural banking and finance, associated financial products and loan appraisal processes</li> </ul>

*\*Reference to technical assessment grid*

### III. Communications Expert (1 Nos., Expert 2)

#### Tasks

- Support Team Leader and Experts in smooth execution of tasks pertaining to maximizing the outreach for the e-LMS module for PM KUSUM Scheme.
- Support in development and implementation of specific measures with officials & senior management of FIs, intermediary agencies, consortia, personnel and other organizations in the BFSI sector to disseminate the e-LMS amongst the target group within Financial Institutions.

Parameter	Reference*	Details
Qualification	2.3.1	<ul style="list-style-type: none"> <li>Master's degree in communications/public relations preferably with specialization in international development/public policy/agri-finance</li> </ul>
Language	2.3.2	<ul style="list-style-type: none"> <li>Good language skills in Hindi, English</li> </ul>
General professional experience	2.3.3	<ul style="list-style-type: none"> <li>At least 7 years of professional experience in communications/public relations in the development sector</li> </ul>
Specific professional experience	2.3.4	<ul style="list-style-type: none"> <li>At least 4 years of experience in communications/public relations in the field of financial advisory or BFSI sector (please provide at least 2</li> </ul>

		previous relevant project descriptions and/or references)
ODA / Development cooperation experience	2.3.7	<ul style="list-style-type: none"> <li>Experience of managing ODA financed project and quality protocol of international development agencies</li> </ul>
Other	2.3.8	<ul style="list-style-type: none"> <li>Experience of working with FIs, banks, banker associations, conglomerates in the BFSI sector.</li> </ul>

*\*Reference to technical assessment grid*

#### 4B. Quality Assurance Requirements

To ensure the quality of the outputs the organisation must meet the following requirements:

- GIZ honours intellectual copyrights and strictly prohibits any copyright violations and plagiarism
- Reports or documents pertaining to the project and prepared by the organisation need to be thoroughly verified prior to submission. Sub-quality deliverables would not be accepted. It is expected that all documents will undergo a final proofread by the team leader
- All meetings will be documented by the organisation. The minutes of meetings need to be approved by the staff of GIZ
- The organisation is not allowed to replace project staff without prior approval by the staff of GIZ
- All the steps of the scope shall be coherent and complimentary in nature, and they should not be considered as individual isolated steps
- GIZ encourages to share the results achieved from the assignment including relevant data with the larger audience for better sectoral learnings, with prior approval of GIZ.
- The bidder organisation can refer to the parameters mentioned in the technical assessment grid (attached in the Tender document) to prepare the technical proposal.

### 5. Costing requirements

#### 5.1 Assignment of personnel

Human Resource	Number	Person-Day (Spread across 10 months)
Team leader	1	1 x 80 = 80
Trainer	2	2 x 47.5 = 95
Communications Specialist	1	1 x 125 = 125
Total	4	300

#### 5.2 Travel

The bidder is required to calculate the travel by the specified experts and the experts it has proposed based on the places of performance. The bidder is required to list the expenses with breakups as per the following estimation:



- Flight/mostly train travel costs: 40 Trips
- Intercity/inter-district travel costs: 45 Trips
- Accommodation costs (mainly villages, tier 1, 2 and 3 cities): Approx. 40 days
- Daily allowance (in line with envisaged trips stated above): Approx. 85 days

*Note: If it is envisioned that travel will be done using bike/ private vehicle, bidder is expected to provide budget based on approximate number of trips and cost of travel on per km basis.*

### 5.3 Events

The trainings will be conducted in the following locations:

1. Gurugram, Haryana
2. Noida, Uttar Pradesh
3. Agra, Uttar Pradesh
4. Dehradun, Uttarakhand

Training rooms and other basic infrastructure for participants, basic audio-visual equipment will be provided for by the **Bank**. The bidder should not account for infrastructure and venue costs in the budget since the same will be looked after by the **Bank**.

## 6. Requirements on the Format of the Bid

### 6.1 General Requirements

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

The complete bid shall not exceed 30 pages (excluding CVs & other supporting company documents)

The CVs of the personnel proposed in accordance with Section 5 of the ToR must be submitted using the format specified in the terms and conditions for application. At the proposal stage, it is essential to submit the CV of all team members/project personnel. Individual CVs shall not exceed 2 pages. The CVs must clearly show the position and job, the proposed person held in the reference project, complete detail of the reference project and duration of association. The CVs must be submitted in English (language).

If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment.

Please calculate your price bid based exactly on the aforementioned costing requirements. In the contract the contractor has no claim to fully exhaust the days/travel/workshops/ budgets. The number of days/travel/workshops and the budget amount shall be agreed in the contract as 'up to' amounts. The specifications for pricing are defined in the price schedule.

## 6.2 Further Requirements

- All reports, slides, presentations and other media and information material need to be submitted to GIZ in soft copy. In certain cases the slides, presentations may be required to be furnished in format specified by GIZ.
- Timelines shall be strictly adhered and delays in any of the deliverable shall be reported and aligned with GIZ in advance.
- In order to select a suitable organisation, GIZ may invite shortlisted organisations to present their methodology and approach to a committee which will help GIZ in making final selection. In case it is required, the bidder will be informed in advance.
- GIZ reserves the right to cancel or modify this tender. Notice will be provided accordingly

## 7. Annexes

### Annexure – I

Tentative training schedule is as follows and is subject to change on the basis of participants' availability. The trainings will be conducted at the Bank-owned training centres at Agra, Dehradun, Gurugram and Noida.

Detail	Number (Approx.)
Participants envisaged to be trained per Month (assuming 8 months of training period)	62
Batches envisaged to be trained per month	2 to 3
Approximate No. of Participants per Batch	20 to 30

*Note: the aforementioned training schedule is tentative and is subject to change at the **Bank's** discretion. To create this schedule, certain assumptions with regards to training period, batch size and total participants have been made – which is also subject to change at the **Bank's** discretion. The final location wise training schedule will be shared with the selected bidder in joint consultation with the **Bank** and GIZ. Minimum participants per batch will be finalized in joint consultation with Bank, GIZ and bidder, post selection of bidder.*

### Annexure – II

#### Overview of Training Content on PM KUSUM-Component B

- Climate change and its impact on the agriculture sector
- Origin and introduction to PM KUSUM Scheme
- SIP technology, techno-economics and financing potential
- Green financing, good lending practices and potentials for convergence with other schemes
- Case study and hands-on training on SIP sizing tools