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

Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

CONSULTANT FOR DEVELOPING STRATEGIC PLAN (2025 – 2029) OF MINISTRY OF ENERGY AND MINERAL RESOURCES	Project number/ cost centre: 17.9053.4-001.00

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0. List of abbreviations

Bappenas	Ministry of National Development Planning
ESDM	Ministry of Energy and Mineral Resources
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
IKU	Primary Working Indicator
Renstra	Strategic Plan
RPJMN	National Mid-Term Development Plan
RPJPN	National Long-Term Development Plan
SEA	South East Asia
ToRs	Terms of reference

1. Context

Every 5 years, Government of Indonesia releases National Mid-Term Development Plan (RPJMN) document. This document is one part of the longer-term national development plan (RPJPN), which released every 20 years. RPJMN consists of national development strategies, general policies, priority projects, ministry and cross-ministries programs, etc. The document is prepared by the Ministry of National Development Planning (Bappenas).

RPJMN then being derived and translated into Strategic Plan (Renstra) document by technical ministries. Generally, Renstra consists of (1) achievements based on the previous Renstra, (2) vision and missions of the respective ministry, (3) breakdown of the strategies, (4) institutional and regulatory framework, and (5) working indicator and financing matrix.

Approaching 2025, the current government is preparing the next planning documents RPJPN 2025 – 2045, RPJMN 2025 – 2029 and Renstra 2025 – 2029. The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) supports the Ministry of Energy and Mineral Resources (ESDM) through Planning Bureau (*Biro Perencanaan*), to develop the next Strategic Plan document, Renstra ESDM 2025 – 2029.

2. Tasks to be performed by the contractor

The contractor is responsible for providing the following services:

- **Phase I** (3-4 months):
  - **Review** the existing **Renstra ESDM 2020 – 2024** → Together with Planning Bureau, review the existing Renstra ESDM 2020 – 2024, check the achievements against the targets for each indicator. Determine which indicators should be kept in Renstra 2025 – 2029.
  - **Determine the current issue to be integrated into the upcoming Renstra** ESDM 2025 – 2029 → Together with Planning Bureau, determine any current relevant issues to be included in the upcoming Renstra. Plan how to translate the issue into indicators and set the initial target.
  - **Propose a new set of Primary Working Indicators (IKU)** → combining the results of 2 previous tasks, a new set of IKU shall be submitted to Planning Bureau.
  - **Write the first draft of Technocratic document Renstra 2025 - 2029 for RPJMN**→ in parallel with the development of new set of IKU, the contractor is expected to write the first draft of Technocratic document Renstra 2025 – 2029 for RPJMN. At this point, the content includes (1) review result of Renstra 2020 – 2024, (2) narrative of additional relevant issues to be included in the upcoming Renstra, and (3) proposed IKUs along with the target. All the contents shall be aligned with the target mentioned in RPJPN.
- **Phase II** (12 months):
  - **Disseminate the proposed IKUs internally** within ESDM (Echelon 1 and Echelon 2 level) → the proposed IKUs then presented to internal ESDM, especially to Echelon 1 and 2 level, because they will be assigned to one or more indicators and develop its derivative (Program Indicators/*Indikator Program* and Activity Indicators/*Indikator Kegiatan*).
  - Become a **focal point for technical consultation** by the team of Echelon 1 and Echelon 2.
  - **Write the second draft of Technocratic document Renstra 2025 - 2029 for RPJMN** → in parallel with the development of Program Indicators and Activity Indicators by Echelon 1 and 2, the contractor is expected to develop the second

draft. At this point, the content includes (1) content from first draft refined and (2) regulatory and institutional framework based on RPJPN. All the contents shall be aligned with the target mentioned in RPJPN.
  - **Engage in series of discussions** with Echelon 1 and 2 teams (under Planning Bureau's permission and supervisory)
  - **Compiling and combining** the submitted **Program Indicators and Activity Indicators** from Echelon 1 and 2 → to make a complete set of new indicators for the upcoming Renstra ESDM 2025 – 2029.
- **Phase III** (3-4 months):
  - **Write the final draft of Renstra ESDM 2025 – 2029**.
  - **Disseminate the Renstra ESDM 2025 – 2029** to Bappenas.

Based on the services to be performed, the contractor is responsible for the following deliverables:

- Proposal of new set of IKUs based on the review of Renstra ESDM 2020 – 2024 which have been integrated with the current relevant issues.
- First draft (word and PPT) of Renstra ESDM 2025 – 2029 or Technocratic document for RPJMN.
- Second draft (word and PPT) of Renstra ESDM 2025 – 2029 or Technocratic document for RPJMN.
- Complete set of new IKUs and the derivatives.
- Final draft (word and PPT) of Renstra ESDM 2025 – 2029.

Milestones/partial works	**Deadline/place/person responsible**	**Criteria for acceptance**
IKU Proposal (Excel)	3 months from signing	Accepted and approved by Planning Bureau of ESDM
1st Draft/Technocratic (word + PPT)	3 months from signings	Accepted and approved by Planning Bureau of ESDM
2nd Draft/Technocratic (word +PPT)	3 months from 1st draft	Accepted and approved by Planning Bureau of ESDM
Complete set of new indicators (Excel)	6 months from 2nd draft	Accepted and approved by Planning Bureau of ESDM
Final Draft (word + PPT)	3 months from the complete set of new indicators	Accepted and approved by Planning Bureau of ESDM

Period of assignment: from 29 Dec 2023 until 31 May 2025.

3. Concept

In the tender, the tenderer is required to show *how* the objectives defined in Chapter 2 (Tasks to be performed) are to be achieved, if applicable under consideration of further

method-related requirements (technical-methodological concept). In addition, the tenderer must describe the project management system for service provision.

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 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.

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 months) and locations of the individual members of the team complete with the allocation of work steps as set out in the schedule.

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 leader

<u>Tasks of the team leader</u>

- Overall responsibility for the advisory packages of the contractor (quality and deadlines)
- Coordinating and ensuring communication with GIZ, partners and others involved in the project.
- Personnel management, in particular identifying the need for short-term assignments within the available budget, as well as planning and steering assignments and supporting local and international short-term experts.
- Regular reporting in accordance with deadlines
- Team leader is expected to reside in Planning Bureau's office by the time of the project, back-to-back with personnel from GIZ, the arrangement will be decided upon agreement later.

Qualifications of the team leader

- Education/training (2.1.1): university degree (German 'Diplom'/Master) in engineering or management or economy
- Language (2.1.2): C2-level language proficiency in Indonesian
- General professional experience (2.1.3): 15 years of professional experience in the energy sector
- Specific professional experience (2.1.4): 8 years in renewable energy or oil and gas or mining or power sector
- Leadership/management experience (2.1.5): 5 years of management/leadership experience as project team leader or manager in a company
- Regional experience (2.1.6): 8 years experience in projects in Indonesia
- Other (2.1.8): Knowledge on Just Energy Transition and its landscape in Indonesia

Key expert 1

Tasks of key expert 1

- Become the focal point of tasks related to climate and energy sector.
- Perform advisory tasks.
- Provide advisory for cross sectoral issues.

Qualifications of key expert 1

- Education/training (2.2.1): university degree (German 'Diplom'/Master) in engineering or management or economy
- Language (2.2.2): C2 -level language proficiency in Indonesian
- General professional experience (2.2.3): 10 years of professional experience in the climate and energy sector
- Specific professional experience (2.2.4): 6 years in oil and gas or mining or power or renewable energy sector
- Regional experience (2.2.6): 6 years in projects in Indonesia (country)

Key expert 2

Tasks of key expert 2

- Become the focal point of tasks related to organisational management.
- Perform advisory tasks.
- Provide advisory for cross sectoral issues.

Qualifications of key expert 2

- Education/training (2.3.1): university degree (German 'Diplom'/Master) in engineering or management or economy
- Language (23.2): C2 -level language proficiency in Indonesian
- General professional experience (2.3.3): 10 years of professional experience in the business management/organisational management sector
- Regional experience (2.3.6): 6 years in projects in Indonesia (country)
- Other (2.3.8): Knowledge/experience in organisational management in government (ministerial level)

Short-term expert pool with minimum 0, maximum 2 members

Upon requests from partner, for the technical assessment, an average of the qualifications of all specified members of the expert pool is calculated. Please send a CV for each pool member (see below Chapter 7 Requirements on the format of the bid) for the assessment.

Tasks of the short-term expert pool

- Become the focal point of tasks related to energy efficiency sector and/or organisational management.
- Perform advisory tasks.
- Provide advisory for cross sectoral issues.

Qualifications of the short-term expert pool 1

- Education/training (2.6.1): 1 expert with university qualification (German 'Diplom'/Master) in engineering or management or economy
- Language (2.6.2): 1 expert with C2-level language proficiency in Indonesian
- General professional experience (2.6.3): 1 expert with 10 years of professional experience in the energy sector
- Specific professional experience (2.6.4): 1 expert with 6 years of professional experience in oil and gas or mining or power or energy efficiency or renewable energy sector.

Qualifications of the short-term expert pool 2

- Education/training (2.7.1): 1 expert with university qualification in engineering or management or economy (German 'Diplom'/Master)
- Language (2.7.2): 1 expert with C2-level language proficiency in Indonesian
- General professional experience (2.7.3): 1 expert with 10 years of professional experience in the business management/organisational management sector
- Specific professional experience (2.7.4): 1 expert with 6 years of professional experience in oil and gas or mining or power or energy efficiency or renewable energy sector.

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 and overnight accommodation 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 at https://www.bundesfinanzministerium.de).

Accommodation costs which exceed this up to a reasonable amount and the cost of flights and other main forms of transport 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 would like to reduce greenhouse gas emissions (CO_2 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 CO_2 efficiency. For short distances and travel inside Java island travel by train (executive class) or e-mobility should be the preferred option.

If they cannot be avoided, CO_2 emissions caused by air travel should be offset. GIZ specifies a budget for this, through which the carbon offsets can be settled against evidence.

There are many different providers in the market for emissions certificates, and they have different climate impact ambitions. The Development and Climate Alliance (German only) has published a list of standards (German only). GIZ recommends using the standards specified there.

2 Contracts for works:

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

Since the contract to be concluded is a contract for works, we would ask you to offer your services at a lump sum price. Therefore, please divide the lump sum price into the milestones described below. The price per milestone must contain all relevant costs (fee, travel expenses etc.).

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

Milestones/partial works	Estimated expert days for orientation	Deadline/place/person responsible
IKU Proposal	70	3 months from signing
1st Draft	22	3 months from signings
2nd Draft	128	3 months from 1st draft
Complete set of new IKUs	184	6 months from 2nd draft
Final Draft	90	3 months from the complete set of new indicators
Dissemination	14	3 months from the complete set of new indicators

6. Requirements on the format of the tender

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

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

The CVs of the personnel proposed in accordance with Chapter 4 of the 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).

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