

## TERMS OF REFERENCE FOR THE PROVISION OF INTERNATIONAL TRAINING SERVICES IN ESG ASSESSMENT

### Background

Caritas Czech Republic in Mongolia implements the "Switching on the Green Economy" (SOGE) project, funded by the European Union's Switch Asia program, from 2022 to 2025, along with 3 project partners: People in Need INGO, Mongolian Sustainable Finance Association NGO (MFSa), and Development Solutions NGO. The goal is to encourage a gradual shift to a low-carbon, resource-efficient circular economy in Mongolia through introducing eco-labelling and green certification to the Mongolian market.

As part of the project activities, the project team is seeking an international training service provider or an independent consultant with expertise in training, consulting, and/or verification and validation in alignment with internationally recognized ESG standards, policies, and processes. The selected training provider will deliver capacity-building programs for local ESG consultants, equipping them to assist 20–30 local MSMEs and retailers in implementing ESG standards within their operations. Additionally, the training provider will train local ESG verifiers to conduct ESG verifications/audits for the same group of MSMEs and retailers. The target MSMEs and retailers will be producers in the agri-food and beverage sector, excluding meat and milk-related production.

### Training deliverables

The selected training provider or independent consultant will deliver production-focused Environmental, Social, and Governance (ESG) training sessions as outlined below to approximately 30 local ESG consultants and 30 ESG verifiers:

No	Training topic	Details	Estimated timeline
1	Online ESG introductory training for local consultants and verifiers (1 day)	The content includes international ESG standards, key themes and topics, the purpose and benefits of ESG, as well as the ESG landscape, trends, and more.	Feb 2025
2	Online ESG implementation course	The content includes implementation stages, ESG tools and guidance, gap	Feb 2025

	<u>for local consultants</u> (2-5 days)	assessments, and planning for ESG integration, as well as strategies and supporting documentation. It also covers practical ESG implementation processes, enriched with case studies to provide real-world insights. Overall content and implementation tools provided should be useful and practical for local ESG consultants to implement them in MSMEs' operations.	
3	On-site ESG mentoring and workshops for local ESG consultants (5-7 days)	The international consultant should visit Mongolia 1.5 months after the online training to assess and advise on the ESG consulting activities of the local consultants. This will include selecting 2-4 MSMEs to visit the MSMEs to review their ESG implementation and provide recommendations to the organizations and consultants to improve implementation. This task should use an appropriate combination of MSME office, factory visits and training workshops.	March-April, 2025
4	Online ESG verification training <u>for local verifiers</u> (5 days)	The content includes ESG verification processes enhanced with case studies, as well as a range of supporting documents, tools, and additional resources to ensure a comprehensive understanding and application.	April-May, 2025

The total working time will be approximately 23 working days including 7 working days of in-country time required for the tailored training service and preparation time.

***Other relative elaboration:***

## ESG assessment development:

**ESG assessment tool:** Currently, MFSA has developed a production-based ESG assessment tool with over 170 criteria as part of the SOGE project. This tool is based on a combination of international and local standards, including the ISO 14001 family, WBA, ESRS, SASB, GRI, Malaysian Simplified ESG Disclosure Guidance, UN Global Compact, and MFSA's ESG Reporting Guidelines. The assessment questionnaires are designed to measure the sustainability maturity level of target MSMEs using the PDCA (Plan-Do-Check-Act) cycle framework. Accordingly, the selected international trainer should focus on aligning their ESG training and workshops with this assessment tool to ensure consistency and relevance (Please refer to Annex 3)

**Post-Training activities:** Following the training activities, MSFA will manage the verifiers responsible for second-party verification of the selected 20-30 MSMEs. Additionally, the ESG assessment will be further developed and piloted in connection with the newly introduced ESG-linked loans and sustainability-linked loans in Mongolia.

## Category A (Training service provider - Company)

### Qualifications of the Training Service Provider:

- A minimum of 10 years of experience in sustainability (ESG) standards;
- Specialised focus on training services related to topics such as GHG emission, energy, waste management, PEF standards, water management, sustainability management, occupational safety and health (OHS), human resources, human rights, gender and corruption;

**The training provider must have at least one professional trainer who meets the following qualifications:**

### Required qualifications:

- Proficiency in verbal and written professional English skills;
- A minimum of 6-8 years of experience in ESG (environment, social, and governance) ;
- A Master's degree in environmental management, sustainability, or a related field ;
- Experience in mentoring or clearly communicating complex ideas;
- Experience in consultancy and/or onsite auditing ;
- Experience conducting ESG and sustainability assurance activities, including remote documentation review, onsite audits, and audit program management.
- Preferable if the trainer has teaching and verification experience in relative, similar frameworks, and key ESG topics;

- Willingness to cooperate with project team members and develop training materials that align with the above-mentioned standards and the schemes developed under the SOGE project.

#### **Preferred qualifications:**

- Demonstrable experience working cross-culturally;
- An adaptable, problem-solving outlook;
- Advantageous if experienced with ISO 14019, GRI, SASB, TCFD, TNFD, and other internationally recognised sustainability standards;
- Advantage to have experience securing accreditation for the conformity assessment bodies in sustainability assurance;

### **Category B (Independent consultant)**

#### **Qualifications and skills of the consultant:**

##### **Required qualifications:**

- Proficiency in verbal and written professional English skills;
- A minimum of 6-8 years of experience in ESG (environment, social, and governance) ;
- A Master's degree in environmental management, sustainability, or a related field ;
- Experience in mentoring or clearly communicating complex ideas;
- Experience in consultancy and/or onsite auditing ;
- Experience conducting ESG and sustainability assurance activities, including remote documentation review, onsite audits, and audit program management.
- Preferable if the trainer has teaching and verification experience in relative, similar frameworks, and key ESG topics;
- Willingness to cooperate with project team members and develop training materials that align with the above-mentioned standards and the schemes developed under the SOGE project.

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## Deliverables

	Deliverables	Working days
1	Develop and provide training materials in English, including templates, presentations, and all materials that will be used during the training program.	5
2	<p>Deliver online and in-person ESG training sessions listed above in English, tailored to specific standards and differentiated for verifiers, and consultants, including a 1 exam to specific to consultants and verifiers. Organise written exams, including the preparation writing of exam questions and answer sheets. Participants should receive a [1] participation certificate and [2] ESG Certificate upon passing the exam.</p> <p>*In regards to <b>Accredited ESG Certificate</b>, please provide the cost separately in the financial proposal (Category A).</p> <p>*In case an individual consultant sends a proposal (Category B), the Mongolian Service Provider can collaborate in providing relevant certificates mentioned above.</p>	13
3	Conduct a 5-day onsite consultation for practical learning at the client's premises after 1.5 months of the implementation.	5

\*Include logistics cost (e.g flight and accomodation)

## Selection criteria weighting

Offers will be evaluated based on the following criteria:

1. **Technical Evaluation** (Maximum weight: 70%)
2. **Financial Evaluation** (Maximum weight: 30%)

## Category A (company)

[1] Technical Evaluation Criteria	Percentage	Score
<b>[1.1] Technical evaluation: Qualifications</b>		
Qualifications of organisation	15%	5
Qualifications of trainer	10%	5
<b>[1.2] Technical evaluation: Professional experience</b>		
Work experience of organisation in relative fields	10%	5
Previous proven experience of the trainer	15%	5
<b>[1.3] Technical evaluation: Training methodology</b>		
Methodology including PPT with trainer's notes, student handouts, teacher handbooks, reading materials, case studies, workshop tools/ Approach and Work schedule and planning for deliverables, assignments, and inputs	20%	5
<b>[1] Total Technical Evaluation Criteria</b>	70%	25
<b>[2] Financial evaluation</b>	30%	5

## Category B (independent consultant)

[1] Technical Evaluation Criteria	Percentage	Score
Qualifications of trainer	20%	5
Previous proven experience of the trainer	30%	5
Methodology including PPT with trainer's notes, student handouts, teacher handbooks, reading materials, case studies, workshop tools/ Approach and Work schedule and planning for deliverables, assignments, and inputs	20%	5
<b>[1] Total Technical Evaluation Criteria</b>	70%	15

[2] Financial evaluation	30%	5
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## Request for clarifications

Clarifications may be requested no later than 3 (three) days before the submission deadline by email: [tsendsuren.boldbaatar@caritas.cz](mailto:tsendsuren.boldbaatar@caritas.cz) and [ccr.mongolia.office@caritas.cz](mailto:ccr.mongolia.office@caritas.cz). Bidders can also request online meeting to clarify further details in relation to submission of proposals by completing <https://forms.office.com/e/7nnrYjhrVk>

## How to apply

Interested international training providers should submit the following documents to [tsendsuren.boldbaatar@caritas.cz](mailto:tsendsuren.boldbaatar@caritas.cz) and [ccr.mongolia.office@caritas.cz](mailto:ccr.mongolia.office@caritas.cz) by 5 pm (UTC), January 20th, 2025. The email subject should be "SOGE\_International training ESG\_CategoryA/B\_your company name/consultant name". Please indicate under which category you apply ("A" category for company and "B" category for individual consultant)

1. Proposal including methodology and approach, financial budget, timeline, and work plan (in English). For technical evaluation, include:
  - Samples of training materials (e.g. sample PPT with trainer's notes, Student handouts, Reading materials, case studies, and workshop tools)
2. Company profile (applies to Category A);
3. Curriculum vitae of a trainer;
4. Links or attachments to similar works such as training curricula, reports, studies, and publications;