

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

Project title: Promoting the development of a hydrogen economy in South Africa (H2.SA) **Project number/
cost centre:** 21.2230.7-001.00

Country:
South Africa

Subject of the tender procedure:
**DEVELOPMENT OF A CAPACITY DEVELOPMENT STRATEGY FOR
DECISION MAKERS AND PARTNERS IN THE H2.SA PROGRAMME**

List of abbreviations	2
0. Context.....	3
2. Tasks to be performed by the contractor	7
3. Technical methodological concept.....	10
3.1 Strategy (section 1.1 of the assessment grid):.....	10
3.2 Cooperation (section 1.2 of the assessment grid).....	10
3.3 Steering structure (section 1.3 of the assessment grid)	10
The tenderer is required to describe and explain its approach and its method for steering the measures with the partners involved in delivering the services set out in the tender (section 1.3.1 of the assessment grid).	10
3.4 Processes (section 1.4 of the assessment grid)	10
3.5 Learning and innovation (section 1.5 of the assessment grid)	11
3.6 The contractor's project management activities (section 1.6 of the assessment grid).....	11
3.7 Other specific requirements.....	11
4. Personnel concept	12
Team leader (national expert)	12
Expert 1: National Expert in Trainings and Stakeholder Engagement.....	12
5. Costing requirements	13
Assignment of personnel.....	13
Travel.....	13
Meetings, workshops, training	13
Other costs.....	14
Flexible remuneration item	14
6. Inputs of GIZ or other actors	14
7. Requirements on the format of the bid.....	14
8. Annexes	16

List of abbreviations

AVB	General Terms and Conditions of Contract (AVB) for supplying services and work 2018
CD	Capacity Development
CDS	Capacity Development Strategy
CSIR	Council for Scientific and Industrial Research
DC	Development Cooperation
DFFE	<i>Department of Forestry, Fisheries and the Environment</i>
DMRE	Department of Mineral Resources and Energy
DSI	Department of Science and Innovation
dtic	Department of Trade, Industry and Competition
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
H ₂	Hydrogen
HySA	Hydrogen South Africa
IIO	Investment and Infrastructure Office
NDP	National Development Plan
PtX	Power to X
RE	Renewable Energy
SAGEN	South-African German Energy Programme
SANEA	South African National Energy Association
SANEDI	South African National Energy Development Institute
SDGs	Sustainable Development Goals
TC	Technical Cooperation
ToRs	Terms of reference

0. Context

In the context of a rapidly decreasing global carbon budget and urgency to identify adequate solutions for decarbonizing the so-called hard-to-abate sectors, the demand for “green” hydrogen (H₂), which refers to H₂ produced utilising renewable energy sources via electrolysis, and renewable hydrogen-based products (PtX) such as ammonia and synthetic jet fuels, is steadily increasing. Many off takers (e.g., Germany, the EU, Japan) are willing to pay a premium price and to sign long-term supply agreements to stimulate the renewable H₂/PtX market development. Renewable hydrogen, however, also offers domestic use opportunities to countries like South Africa, characterised by favourable solar and wind energy conditions, sufficient mineral resources and existing hydrogen value chains and industries. Given this potential, and within the framework of the German National Hydrogen Strategy, the Governments of Germany and South Africa agreed to cooperate on a renewable hydrogen project with the objective to contribute to the establishment of a green hydrogen economy for South Africa.

PtX in South Africa

South Africa could position itself as a major supplier of PtX products due to its outstanding renewable energy (RE) potential (mainly solar and wind energy) and existing synthetic fuel production facilities. In addition, South Africa has the world's largest reserves of the precious metal platinum, which is used in fuel cells, but also in electrolyzers, which are essential for producing hydrogen. South Africa was responsible for 72% of the global platinum production in 2018. The research and innovation network Hydrogen South Africa (HySA), which was established in 2008 aims at advancing the development of hydrogen and fuel cell technologies and at opening new markets for South African platinum.

Political decision-makers and companies in South Africa are increasingly recognizing the potential of a green hydrogen economy. SASOL is currently developing initial projects for the production and processing of green hydrogen with the participation of German companies. The Department of Science and Innovation (DSI) published a Hydrogen Society Roadmap (HRM) in early 2022 and the Department of Trade, Industry and Competition (the dtic) is working on a green hydrogen industrialization strategy.

At the Department of Mineral Resources and Energy (DMRE), first steps to investigate a potential hydrogen economy has been launched. Although there is no explicit strategy to implement the 2030 Agenda in South Africa so far, the National Development Plan (NDP) 2030 makes implicit reference to the Sustainable Development Goals (SDG's), referencing to poverty reduction, expansion of the green economy, food security and land issues, among others.

The creation of new jobs associated with the development of a green hydrogen economy in South Africa also offers opportunities for women, who have so far been significantly underrepresented in the coal-dominated energy sector. Potentials for improving gender equality have been identified and shall be addressed within the project “Promoting the development of a hydrogen economy for South Africa” (H₂.SA).

The transformation of a society and economy focused on the consumption and export of coal towards a green hydrogen economy involves considerable structural change. The change offers opportunities for the actors involved but can also be associated with negative socio-economic effects and thus an impairment of human rights. In particular, the possible negative impacts of a massive expansion of very large RE power plants should be mentioned here (e.g., necessary resettlement measures, competing land use and restriction of habitat). Thus, all the

activities included in this ToR that will be outlined below, shall ensure that no unintended social impacts or human rights violations occur as a result of the RE expansion and that internationally applicable environmental and social standards are complied with. This also applies for any foreseeable growth in the PtX/H2 business.

Contextualization of the project H2.SA

The project "Promoting the development of a green hydrogen economy for South Africa (H2.SA)" is part of the Development Cooperation (DC) program "Energy and Climate (Green Economy) in South Africa". The program aims to support the partner government in achieving its climate goals and to contribute to a more environmentally sustainable and less coal-based as well as climate-smart economy.

While the German DC program is primarily motivated by the climate policy dimension of an energy transition, South African policy makers tend to align their decisions with economic and growth objectives. The program's contributions to achieving additional annual renewable energy expansion targets, as well as to creating new job opportunities in the green economy, satisfy both motives. Additionally, the development of a viable market for green hydrogen products also offers new export opportunities for the South African Industry, and thus an increase in local value creation.

In order to create these conditions, H2.SA supports local actors in improving strategic and regulatory frameworks, in creating favourable starting conditions for new economic activities in the field of research, development, and training, and in aligning all these activities with international and national environmental and social standards. Regarding renewable energy, the project interacts and has a complementary effect with the TC module "Renewable Energy and Energy Efficiency in South Africa (SAGEN)" and its follow-up module "Supporting the Transformation of the South African Energy Sector", which is currently being planned. SAGEN strengthens the competencies of South African decision-makers and executives for the effective implementation of a power sector reform geared towards an increasing share of variable RE in the national and municipal power supply. The offered TC module indirectly promotes the development of additional RE capacities for power generation through the establishment of a hydrogen economy. Furthermore, the module is planned and implemented in close coordination with the project "Improvement of grid and system integration of variable renewable energies" (SAGEN-CET), in the implementation of training measures and the expansion of academic educational offers in the field of hydrogen and RE for hydrogen production. The project implementation period is from August 2021 to December 2023.

Local Partners

The main political partner of H2.SA is the **Investment Infrastructure Office (IIO)** in The Presidency. As the executive manager of government, The Presidency is at the apex of the system of government in the Republic of South Africa. The Presidency's key role in the executive management and co-ordination of Government lies in its responsibility to organize governance. In this regard, a key aim is the facilitation of an integrated and co-ordinated approach to governance. This is being achieved through creative, cross-sectoral thinking on policy issues and the enhancement of the alignment of sectoral priorities with the national strategic policy framework and other Government priorities. The IIO is The Presidency's central coordinating body for infrastructure development, investment planning and mobilization. The IIO has very well-trained staff with clear ideas on how to enter a hydrogen economy. Capacity-Development is needed in the area of **planning, preparation and implementation of selected H2/PtX-lighthouse projects.**

The four main institutions of the downstream partner structure are: the Department of Mineral Resources and Energy (DMRE), the Department of Trade, Industry and Competition (dtic), the Department of Science and Innovation (DSI), as well as the Department of Forestry, Fisheries and the Environment (DFFE).

The **DMRE** has the mandate to formulate and implement the country's energy policy. It is responsible for planning the power sector, monitoring the power supply, and formulating preventive measures to avoid power shortages. The ministry has about 530 employees, about 80% of whom are specialists and managers. DMRE staff have in-depth knowledge of mining and conventional power generation and transmission. However, they require a more advanced **process and expertise to develop and adapt policies and strategies for building a green hydrogen economy.**

The **DTIC** promotes structural change in South Africa with the aim of building a dynamic, industrial and globally competitive economy. The ministry has about 1,200 employees, about one third of whom work in administration. With a percentage of 54%, women are represented in the upper management. The ministry's professionals have extensive knowledge of economic development and financing.

The **DSI** aims to promote South Africa's socio-economic development through research and innovation. One of the main tasks is to create an enabling environment and resources for science, technology and innovation. Recently, the DSI has published its national Hydrogen Society Roadmap (HSRM), which contains some elements which could be part of a future nation-wide strategy. The DSI's technical and managerial staff generally have technical and scientific backgrounds and are currently leading the hydrogen debate in South Africa. **Capacity development needs are particularly in the area of applied research on H2/PtX.**

The **DFFE** serves the protection of the environment and climate and has the mandate to ensure the sustainable use of natural resources. Currently, the DFFE employs about 1,600 people. To fulfill its mandate, **improved knowledge of the environmental and social impacts of a RE-based hydrogen economy is required (e.g., land use, water demand and availability, biodiversity, job creation, negative impacts on affected people/communities).**

Other key stakeholders from the public domain include the South African Bureau of Standards (SABS), the National Treasury, the South African National Energy Development Institute (SANEDI), Eskom Power Plant Engineering Institute (EPPEI), and the Presidential Climate Change Commission (P4C).

Methodological approach

At the level of the individual, the professional competencies of political decision-makers as well as of experts and executives of the above-mentioned institutions of the downstream partner structure and other relevant government agencies as well as the private sector will be strengthened in order to support them in the exercise of their mandate. In order to increase the broad impact, training courses (e.g., on innovative H2/PtX technologies) will be conducted and institutionalized in selected areas in cooperation with local providers.

At the level of organizational development, the TC module addresses the improvement, establishment and management of topic-related working groups, webinars) in order to link competence carriers and thereby promote the exchange of experience in the areas of H2/PtX. On the societal level, the module works on the establishment of networks (e.g., expert networks, association co-operation) in order to intensify the international exchange of experience on H2/PtX and relevant topics as well as to initiate technology and business cooperation.

Since 1996, gender equality has been firmly anchored in the South African constitution. Today, there are some women in South Africa with great political influence, and female executives are increasingly found in politics and business. In the South African parliament, the percentage of women has been around 30% since the end of apartheid. Despite the visible progress, a large proportion of South African women still face a variety of problems and a large social imbalance. The gender gap is particularly evident in the unequal distribution of resources, education, jobs and land ownership. As a result, women have fewer opportunities to exert political or conceptual influence. The TC module shall use its influence on political decision-makers to specifically promote gender equality by advising partners on how to make the hydrogen sector attractive for women (e.g., promoting networks of female experts, strengthening the exchange of experience and knowledge, creating a gender-sensitive working environment, offering women job opportunities).

The module follows a do-no-harm approach by consistently reviewing any interventions to identify what non-intended negative effects these might have on existing conflicts (e.g., competing use of land for agriculture and solar parks). In this context, the module also advocates for disadvantaged population groups, e.g., by creating profit-sharing options for villages and communities affected by RE expansion.

Objective of the assignment

The project has been engaged in capacity development¹ in support of the effective delivery of the programme since 2021. Efforts to enhance the capacity of project partners and decision-makers include various trainings and capacity building support measures, which are being implemented as part of the Output Areas 2 and 3 and which are reflected in the project's operational plan. However, the capacity development interventions of H2.SA have not yet been planned and harmonized as part of a capacity development strategy, which utilises a needs-based and systematic approach and reflects international best practices. Relevant decision-makers and partners, such as the IIO, DMRE, dtic, DSI and DFFE, are yet to define their needs and intended capacities and need to be engaged in the process of developing a capacity development strategy for the above-mentioned areas.

The overall objectives of the (to be developed) CDS are three-fold:

1. To enable local decision makers and project partners to adopt and implement sustainable measures that promote the development of a green hydrogen economy for South Africa, thereby strengthening the delivery of H2.SA,
2. To build on existing skills and knowledge and leverage existing project initiatives to implement a locally driven, coordinated, dynamic and flexible process of change.
3. To contribute to institutionalising capacity development (CD) within partner institutions.

The expected outcomes of the assignment are the following:

- Have a clear understanding of the target groups capabilities and development needs with respect to their specific role for promoting a green hydrogen economy in SA.
- A capacity development strategy which increases the effectiveness and coherence of H2.SA's capacity development activities and links them to the strategic goals of the project.
- A capacity development plan (implementation) which is well integrated in the project's framework, structure, budget and operation plan.

The time-frame of the contract is from 15 August to 30 November 2022.

2. Tasks to be performed by the contractor

The contractor is responsible for providing the following services:

1) Preparatory work and initial assessment of CD gaps

Task 1.1 Preparation of inception meeting

An inception meeting between the contractor and the H2.SA team will be organised upon the signature of the contract to discuss the project's needs and approaches to reach the objective of this assignment. The contractor is expected to present their work plan, methodology and clarify any open questions.

Deliverables:

- Inception report highlighting validated work plan and timelines, detailed methodology (including Capacity Works and/or other tools), to be submitted within 7 working days after inception meeting.

Task 1.2: Initial assessment of CD gaps and context factors

The contractor shall conduct a desk review of existing relevant studies, strategy and training documents of partner organizations and research on secondary literature to get a first overview of potential technical and functional capacity gaps of the project's main partners, especially in collective leadership and coordination, strategic and technical planning as well as evaluation, planning and implementation of measures that promote the development of a green hydrogen economy in South Africa. The contractor shall furthermore analyse any context factors that will drive and constrain CD in the selected organizations and will draft initial hypotheses.

Deliverables:

- Desktop analysis, including initial SWOT analysis and hypotheses

Task 1.3. Preparation of stakeholder engagement

The contractor shall adopt a stakeholder engagement approach which initiates a dialogue on the strengths and weaknesses of the present capacity, and the interest of the CD actors to strengthen their technical and functional capacities, especially in collective leadership and coordination, strategic and technical planning as well as evaluation, planning and implementation of measures that promote the establishment of a green hydrogen economy in South Africa. Such approach shall encourage participation and ownership by all those involved and which commensurates with the objectives of the assignment. The contractor shall draft a key informant interview guide and stakeholder engagement plan for conducting a capacity needs assessment. Both the interview guide and stakeholder engagement plan are subject to GIZ's approval. GIZ will support the contractor in securing interviews and meeting slots.

Key informant interviews and -where adequate- focus group discussions should be held with the following stakeholders: IIO, DMRE, dtic, DSI, DFFE, SABS, CSIR, research institutions, the private sector and GIZ.

Deliverables:

- Interview guide
- Detailed stakeholder engagement plan
- Secured appointments for all key stakeholders

2) Develop a Capacity Development Strategy for main decision-makers and partners

Task 2.1: Conduct a capacity development needs assessment

The contractor shall identify and analyse the main partners' functional and technical capacity gaps, capacity weaknesses and challenges (individual, organizational/ societal), and highlight the key capacity deficiencies. The consultant will identify the CD priorities as well as the current capacity development opportunities. The task includes an analysis of the existing capacity, i.e. strengths, weaknesses, and opportunities at the different levels of CD and desired capacities across the main partner institutions.

Deliverables:

- Overview of stakeholders consulted and summary analysis of the assessment findings, both for desired and for existing capacities
- First recommendations for a capacity development response

Task 2.2: Draft a capacity development response

The contractor will develop a capacity development matrix which helps to systematize capacity development activities and differentiates between the four levels of CD (individuals, organizations, cooperation system, enabling framework). Based on the information gathered during the capacity needs assessment the contractor will propose intended capacities for each level of CD. Using H2.SA's results model the contractor will visualize the interconnections of specific impacts on specific levels. The results model shall also help devising impact hypotheses and connect activities and responsibilities.

The contractor shall furthermore provide a cost estimate and draft time frame for the CD activities, which emerge from the CD matrix.

Deliverables:

- Capacity Development matrix (including SWOT analysis and recommendations on CD)
- Extended results model
- Cost estimate and time frame of CD response

Task 2.3: Feedback meetings on assessment results and Capacity Development Strategy with partners

The contractor will facilitate meetings with each of the five partner institutions to validate the results of the capacity needs assessment report and build consensus on the proposed capacity development response and CD priorities moving forward. These meetings will also help

identifying a pool of CD resource persons from the partner institutions who will support the roll out of the CD strategy and who may be the target group for initial project support.

-

Deliverables:

- Agreed meeting agenda
- One in-person feedback meeting with each partner institution in the Gauteng Province, including meeting documentation to present the results of the capacity needs assessment and discuss the capacity development strategy going forward. The bidder should plan for up to eight (8) feedback sessions/workshops.
- Validated capacity needs assessment report

Task 2.4: Finalize Capacity Development Strategy

Based on the results of the workshops the contractor will finalize the capacity development strategy and integrate specific CD measures into the operational plan of the project. The contractor shall furthermore recommend appropriate knowledge products to raise awareness of the CD approach within the partner organisations and will make suggestions on how best to apply these. The CDS shall include a training plan, specific recommendations on the proposed delivery format, cost estimates and time frames for the CD activities. The maximum page limit of the finalized strategy document is 30 pages (excluding annexes). The proposed CDS shall furthermore be summarized in a MS Powerpoint presentation of up to 20 slides.

Deliverables:

- Finalized CD strategy document, including recommended knowledge products, training concept, training plan and cost estimates.

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

Milestone	Deadline
Desktop analysis of CD gaps and context factors	2 weeks after start of contract.
Detailed interview guide, stakeholder engagement plan and appointments secured for all key stakeholders	1 month after start of contract
Feedback meetings/workshops on assessment results and CD strategy implemented with partner organisations	2 months after start of contract
Finalized CD needs assessment report	2.5 months after start of contract
Finalized CD Strategy document	3 months after start of contract

Period of assignment: From September 2022 until November 2022.

3. Technical methodological concept

In the conceptual design of the tender (technical-methodological approach, project management, if necessary other requirements), the tenderer is required to take specific objectives and requirements into consideration and describe them, as explained below.

In the tender, the tenderer is required to show *how* the specified targets and results are to be achieved with the tasks mentioned in the tender (see section 0). For this purpose, the tenderer should consider the following five factors: strategy, cooperation, steering structure, processes and learning and innovation (sections 3.1 to 3.5).

3.1 Strategy (section 1.1 of the assessment grid):

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 and 2). Following this, the bidder presents and justifies the strategy with which it intends to provide the services for which it is responsible (see Chapter 3).

3.2 Cooperation (section 1.2 of the assessment grid)

The tenderer must describe the relevant actors (local partners and others) for the service in the tender and their interactions (section 1.2.1 of the assessment grid). The tenderer is required to develop a concept that shows how the cooperation with these actors is to be established and put into practice (section 1.2.2 of the assessment grid). The project's cooperation arrangements referred to in section 1 must be taken into consideration.

3.3 Steering structure (section 1.3 of the assessment grid)

The tenderer is required to describe and explain its approach and its method for steering the measures with the partners involved in delivering the services set out in the tender (section 1.3.1 of the assessment grid).

The contractor plays an active role in the results-based monitoring of the project. The tenderer is therefore required to describe how it will monitor the results in its area of responsibility (section 2) in a way that corresponds with the client's expectations and specifications. It must also describe the related challenges (section 1.3.2 of the assessment grid).

3.4 Processes (section 1.4 of the assessment grid)

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 3 are to be provided. In particular, the bidder is required to describe the necessary work steps.

3.5 Learning and innovation (section 1.5 of the assessment grid)

The tenderer must describe its contribution to knowledge management in the project and at GIZ (section 1.5.1 of the assessment grid). The following tasks are to be taken into consideration:

- The contractor's experts are actively involved in GIZ's sector networks.
- The contractor must participate in periodical meetings with the program responsible staff of GIZ; the frequency of those progress meetings is to be defined commonly at contract start; and may vary according to the different activity realization phases.

3.6 The contractor's project management activities (section 1.6 of the assessment grid)

In its tender, the tenderer is required to describe its approach and procedure for coordination with and within the project (section 1.6.1 of the assessment grid).

- The contractor is responsible for selecting, preparing, training and steering the national experts assigned to perform the advisory tasks.
- The contractor makes available equipment and supplies (consumables) and assumes the associated operating and administrative costs.
- The contractor manages costs and expenditures, accounting processes and invoicing in line with the requirements of GIZ.
- The contractor reports regularly to GIZ in accordance with the AVB of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH from 2018

In addition to the reports required by GIZ in accordance with AVB, the contractor submits the following reports:

- Inception report
- Reports on feedback sessions with main partners
- Capacity needs assessment report
- Capacity Development Strategy document

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 following services are part of the standard backstopping package and must be factored into the fees for the staff listed in the tender as ancillary staff costs in accordance with GIZ's General Terms and Conditions:

3.7 Other specific requirements

The assignment should be carried out in a gender sensitive manner putting into consideration gender sensitive stakeholder engagements during consultations, trainings, and gender relevant recommendations.

The successful bidder will consider all necessary data protection requirements in terms of handling project data and will adhere to GIZ data security rules.

4. Personnel concept

The bidder 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.

Team leader (national expert)

Tasks of the team leader

- Overall responsibility for the advisory packages of the contractor (quality and deadlines)
- Design of capacity development strategy and CD measures for local partners in the following areas: collective leadership and strategic planning; planning, preparation and implementation of H2/PtX-lighthouse projects; developing and adapting policies, strategies, norms and standards for building a green hydrogen economy; applied research on H2/PtX; environmental and social impacts of a RE-based hydrogen economy
- Coordinating and ensuring communication with GIZ, partners and others involved in the project
- Ensuring the coherence and complementarity of the contractor's services with other services delivered by the project
- Strategic planning and steering of assignments
- Regular reporting in accordance with deadlines
- Consideration for cross-cutting themes (especially gender equality and sustainability)

Qualifications of the team leader

- Education/training (2.1.1): University qualification (PhD or Masters) in Business/Public Administration or Organisational Development or International Cooperation or Social Sciences or Engineering.
- Languages (2.1.2): full professional proficiency in English
- General professional experience (2.1.3): 7 years of professional experience in capacity development.
- Specific professional experience (2.1.4): 3 years of professional experience in renewable energy and topics related to sustainability and/or hydrogen (3 points out of a possible of 10 points) and 3 years of professional experience in stakeholder engagement processes (7 points out of a possible of 10 points).
- 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): 2 years of work experience in South Africa.
- Development cooperation (DC) experience (2.1.7): 2 years of experience working on DC projects.
- Other (2.1.8) Good understanding of the linkages between green hydrogen, sustainable energy, renewable energy and other related sectors

Expert 1: National Expert in Trainings and Stakeholder Engagement

Tasks of expert 1

- Work with the team leader in planning, conducting and fulfilling the assignment.

- Desk Review of the relevant literature, studies, strategy papers, publications.
- Organisation of stakeholder interviews and focus group discussions in cooperation with GIZ.
- Conduct and facilitate the development of a capacity needs assessment and capacity development strategy.
- Drafting of presentation, reports, minutes, project documentation.

Qualifications of expert 1

- Qualifications (2.2.1): University degree in a Social Sciences or Education or Organisational Development.
- Languages (2.2.2): full professional proficiency in English
- General professional experience (2.2.3): 5 years in education, curriculum development and didactics (5 points out of a possible 10 points) and 3 years of professional experience in research and survey methods including data analysis, qualitative methods and focus group discussions (5 points out of a possible 10 points).
- Specific professional experience (2.2.4): 3 years of professional experience in stakeholder engagement processes and process support.
- Leadership management experience (2.2.5) None
- Regional experience (2.2.6): 2 years of work experience in South Africa
- Development cooperation (DC) experience (2.2.7): 2 years of experience working on DC projects
- Other (2.2.8) - none

Soft skills of team members

In addition to their specialist qualifications, the following qualifications are required of team members:

- Communication skills
- Effective stakeholder engagement and management skills
- Facilitation and presentation skills
- Social and intercultural skills
- Initiative
- Interdisciplinary thinking

5. Costing requirements

Assignment of personnel

Team leader:

Expert 1:

Today 75 days for all experts combined.

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 stipulated in Chapter 1 and 2 and list the expenses separately by daily allowance, accommodation expenses, flight costs and other travel expenses.

Meetings, workshops, training

The contractor implements meetings with a range of different partners and stakeholders. The consultant is responsible for organizing and financing of suitable venues for these face-to-face meetings. In-person workshops (up to 8) should be planned in Gauteng to report back on the results to each key stakeholder.

The service provider should plan for all associated costs such as venue hire, accommodation, catering, equipment hire (audio-visual, etc) printing and participant transport if required.

Other costs

– Not applicable –

Flexible remuneration item

Budget for flexible remuneration: **50,000 ZAR**.

The fixed, unalterable budget given above is earmarked in the price schedule for flexible remuneration. Flexible remuneration is intended to facilitate the flexible management of the contract by the officer responsible for the commission at GIZ. The contractor can make use of the funds in accordance with section 3.3.5.7 of the General Terms and Conditions.

6. Inputs of GIZ or other actors

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

- Necessary internal documents (reports/ studies, strategy documents, training material) for review.
- Link the consultant with main partners and other relevant stakeholders to facilitate the assignment.
- Support mobilization of participants to attend the interviews and feedback meetings.

7. Requirements on the format of the bid

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.

The complete bid shall not exceed 10 pages (excluding CVs, cover pages and references).

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. The CVs must clearly show the position and job the proposed person held in the reference project and for how long.

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.

8. Other Requirements

- Please submit your proposal (technical and price proposal) in separate files/folder to ZA_Quotation@giz.de no later than **29th July 2022** all documents must be in PDF.
- Please do not mention any price for this measure on your cover letter/Technical proposal.
- Please submit your tax clearance certificate with the bidding documents.
- Please submit your price proposal in ZAR.
- Our General Terms of Conditions (attached) shall not be changed/amended should you be the winner of this tender. These General Terms and Conditions will form part of the contract should you be awarded this contract. By submitting your proposal, we will conclude that you have read and accepted these terms and conditions.

- Participating more than once in same tender is not allowed and it will lead to your proposal as well as that of the company where you appear more than once being disqualified. The responsibility rests with the companies to ensure that their partners/experts are not bidding/participating more than once in same tender.

- **Bidders are not allowed to communicate directly with any other person regarding this bid other than the procurement official/s. Failure to comply with this requirement may lead to your bid being disqualified.**
- Bidders must strictly avoid conflicts with other assignments or their own interests. Bidders found to have a conflict of interest shall be disqualified. Without limitation on the generality of the above, Bidders, and any of their affiliates, shall be considered to have a conflict of interest with one or more parties in this EOI and tender process, if they:
 - a) are or have been associated in the past, with a firm or any of its affiliates which have been engaged by GIZ or the Interim Supply Chain Management Council to provide services for the preparation of the design, specifications, Terms of Reference, cost analysis/estimation, and other documents to be used for the procurement of the services in this selection process;
 - b) were involved in the preparation and/or design of the programme/project related to the services requested under this EOI and tender;
 - c) are serving or have been serving in the past three months in the structures of the Interim Supply Chain Management; or
 - d) are found to be in conflict for any other reason, as may be established by, or at the discretion of GIZ.

- In the event of any uncertainty in the interpretation of a potential conflict of interest, Bidders must disclose to GIZ, and seek GIZ's confirmation on whether or not such a conflict exists.
- Similarly, the Bidders must disclose in their proposal their knowledge of the following:
 - a) if the owners, part-owners, officers, directors, controlling shareholders, of the bidding entity or key personnel are family members of GIZ staff involved in the procurement functions and/or the Interim SCM Council or any Implementing partner receiving services under this EOI or tender; and
 - b) all other circumstances that could potentially lead to actual or perceived conflict of interest, collusion or unfair competition practices.
- **Failure to disclose such an information may result in the rejection of the proposal or proposals affected by the non-disclosure.**
- **Questions & Answers will be placed on the link provided.**
- **Bids sent via Dropbox and WeTransfer will not be accepted.**

9. Annexes

Factsheet