

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

Assessment of PYEI workstreams on demand-led skills and agile workforce solutions	Project number/ cost centre: 20.2210.1-001.00
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List of abbreviations

BMZ	German Federal Ministry for Economic Cooperation and Development
DHET	Department of Higher Education and Training
ERRP	Economic Reconstruction and Recovery Plan
GDPR	General Data Protection Regulation
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
GTCC	General Terms and Conditions of Contract
IRM	Installation, Repair, Maintenance
NPMN	National Pathway Management Network
PMO	Project Management Office
POPI	Protection of Personal Information (Act)
PYEI	Presidential Youth Employment Intervention
QCTO	Quality Council for Trades and Occupations
SETA	Sector Education and Training Authority
S2PYEI	Support to the Presidential Youth Employment Intervention project
ToR	Terms of reference

1. Context

1.1 Background: Presidential Youth Employment Intervention (PYEI) and GIZ

South African President Cyril Ramaphosa launched the Presidential Youth Employment Intervention (PYEI) in 2020 to address the persistent challenge of high youth unemployment in the country. Through a mix of demand- and supply-side interventions, the PYEI aims to design, accelerate, and enhance programmes that create opportunities for young people in South Africa to access the labour market, address skills gaps and contribute to economic growth and stability. The PYEI is implemented through a coordinated, multi-sectoral approach and seeks to streamline the efforts of multiple stakeholders in public, private and other non-governmental sectors towards common objectives. It is supported by a Project management Office (PMO) in the Presidency. Find more information on the PYEI at www.stateofthenation.gov.za/presidential-youth-employment-intervention.

On behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ), the *Deutsche Gesellschaft für Internationale Zusammenarbeit* (GIZ) implements the project *Support to the Presidential Youth Employment Intervention* (S2PYEI). The purpose of the S2PYEI is to assist the Presidency in achieving the interventions' goals. This includes aspects of technical, administrative and implementation support.

1.2 About the PYEI/ERRP Demand-led skilling Workstreams

The PYEI component on Demand-led Skills Development is led by the Department of Higher Education and Training (DHET). Within this component, the PYEI seeks to enable more agile responses to short-to-medium term skills needs in growth areas that can translate into emerging earning opportunities for young people. This work is taking place within the framework of the Skills Strategy responding to the Economic Reconstruction and Recovery Plan (ERRP). A key activity in this component has been the establishment of demand-led skilling work streams.

The Presidency and the DHET have established demand-led skilling workstreams that bring together relevant government departments and state agencies, training authorities and service providers with industry actors in five areas. These are digital and Global Business Services, agriculture, automotive, social services (with a focus on health and early childhood education) and Infrastructure/Installation, Repair, Maintenance (IRM). In some sectors, these workstreams have built on pre-existing structures (e.g., digital, automotive). In others (notably agriculture and social services) new structures have been established. Accordingly, workstreams differ in set-up, maturity and scope, with those on automotive, digital/GBS and IRM most advanced. There are currently close to a hundred organisations represented across the five workstreams.

Concrete objectives of the PYEI/ERRP workstreams are

- to identify, within the overall sector, key areas with potential for growth in the short and medium term that can deliver earning opportunities for young people;
- to establish and sustain regular and goal-driven exchange between relevant partners from industry (demand) and the skills/training provision (supply) side;
- to quantify estimates for current and emerging demand for skills in these growth areas, including clear descriptions of the types of skills required;

- against this anticipated demand, identify skills gaps (in terms of numbers and quality of skills available/in the skills pipeline);
- facilitate the design and delivery of interventions that close identified skills gaps and facilitate more efficient linkage of newly skilled or up/re-skilled young people to actual opportunities (e.g., through the National Pathway Management Network, NPMN).

Against this background, **the S2PYEI project seeks the services of a research service provider to assess performance and relevance of the workstream model** to date. This assessment will inform further development of the workstreams.

1.3 Workstream assessment: Rationale, objectives, research questions

With all 5 workstreams active for at least 1 year, the **rationale for this assessment** is to generate key learnings from implementing the mechanism to date, ensure continued and improved relevance and steer further use of resources. The overarching goal will be to reflect on what has worked (and why), what has not worked (and why) and what needs to be done to maintain or expand the value of the respective workstreams.

The objectives of the research and related **sets of research questions** are presented below. These may be further refined or adapted during the assessment process.

Objectives are to identify:

To what extent the workstream model is fit-for-purpose to achieve stated objectives.

- Are workstreams achieving improved coordination among both demand- and supply side actors?
- Are workstreams creating improved and actionable intelligence on skills demand, skills requirements and gaps?
- Are workstreams supporting the development and implementation of skilling-interventions that are likely to meet such gaps?

Overlaps, synergies and complementarities with other skills anticipation and demand-led skills development mechanisms in South Africa

- Are there overlaps and/or complementarities with other efforts to deliver agile workforce solutions? If so, which overlaps should be avoided and which synergies can be realised?
- Do the workstreams offer any other actual or foreseeable value to participating organisations in achieving the goals of demand-led skilling and/or youth labour absorption? If so, which?
- Are role players in these complementary initiatives aware of the workstream initiative and do they believe it adds value to their work?

Common success factors and barriers across workstreams in the key areas of coordination, information exchange and implementation.

- What are operational success factors (i.e. approaches, mechanisms, membership...) that contribute to progress in the workstreams?

- What are key barriers that have hindered progress?
- How do these factors and barriers differ across workstreams? Which ones cut across?
- What role has external support through various consultancies and external grant support played in achieving or hindering progress to date?

Adjustments and support required to improve relevance, performance and integration with other skills anticipation efforts across or within individual workstreams.

- What potential is there to apply learnings from more advanced workstreams to others that are at earlier stages (on the constitution, coordination, data/exchange and implementation continuum)?
- What are the areas that will justify expanded effort? Are there areas that may not warrant further investment?
- What additional support may be required to ensure further progress towards objectives?
- What synergies with other skills anticipation mechanisms can be achieved?

2. Tasks to be performed by the contractor

The contractor will be responsible for designing and implementing the PYEI workstream assessment. Specific tasks and outputs to be delivered by the bidder are:

2.1 Inception and design of overall assessment

As part of the submission for this bid, the bidder will present a first outline of the proposed scope and conceptual approach for the assessment. This should be detailed in the Technical-methodological concept (see 3.) and respond to research objectives below. This is for general orientation and additional detail on research questions and directions only. It does not constitute the final assessment protocol. This protocol will be developed by the contractor in consultation with S2PYEI, the Presidency and DHET.

Upon award, the research service provider will closely work with the Presidency, DHET, the S2PYEI project and any other key stakeholders that may be deemed relevant in developing a final research protocol and related tools and mechanisms for the workstream assessment.

Final outputs will be:

- **An inception report, including agreed details on research design, including research tools and a final delivery timeline and activity plan.** If applicable, this will also include documents and tools required to satisfy standards associated with ethical research and protection of personal data. These documents will be submitted as MS Office or PDF Files.
- **A presentation of the assessment design will be presented to workstream members during regular meetings.** The presentation will be submitted in MS Powerpoint and not exceed 30 minutes in duration. Inputs from workstream members will be documented in an accompanying text document.

Completion of these outputs is expected to take place within the first 8 weeks of the contract.

2.2 Implementation of assessment activities

A mixed-method model (quantitative and qualitative methods) is anticipated to best deliver nuanced and actionable insights on process learnings.

An **initial desk study** should inform an up-to-date description of the current landscape of skills anticipation efforts within South Africa that provide a relevant context for the workstream assessment. Global evidence on good practice approaches should also be summarised.

Using desk research and, where needed, other methods of data collection (e.g. individual or group interviews), the bidder will also **consolidate existing information on the PYEI/ERRP workstreams from existing resources**. These resources include:

- Reports from stakeholders and contractors that provide support to workstreams through external funding (consultancy contracts, grants). This includes Jupilog Consulting, Tetrattech, FHI360, NBI and Harambee.
- Workstream meeting resources including workplans, minutes and agendas.
- At the time of assessment, some workstreams may also have generated data for reporting into the PYEI M&E framework.

On this basis, the bidder will **deliver relevant research activities to generate primary data** that will allow to generate answers to the research questions. This may include suitable qualitative and quantitative research activities, including with a sample or all of the institutions currently participating in workstreams as well as key role players such as relevant Sector Education and Training Authorities (SETA) and Quality Councils for Trade and Occupation (QCTO). The most suitable mix, scope and depth of activities as well as the final sample will be in line with findings from the desk review and with the agreed assessment protocol that the research provider will have developed.

Final outputs will be:

- **A draft report (15-20 pages including an executive summary, A4, Arial 11p) and presentation (Powerpoint, up to 1 hour presentation time) on the findings of the initial desk study and review of existing data sources** and how they inform primary data collection.
- **A detailed implementation plan for primary data collection activities**, including information on aspects such as detailed delivery timelines, participants/respondents,

All secondary (literature and document review) data collection and analysis is to be completed within the first 3 months of the contract. All data collection should be completed by 6 months contract duration.

2.3 Final report and sharing of results

Full assessment findings (from secondary and primary data analysis) will be consolidated in a single report and accessible presentation with key findings. Initial findings will be made available to the Presidency, DHET and S2PYEI before finalisation of the report.

Results will be presented to a core team of organisations (DHET, the Presidency, S2PYEI) and on up to 5 separate dates to members of workstreams.

Final outputs will be:

- **A preliminary report and presentation** (15-25 pages including an executive summary, without Annexes, A4, Arial 11p, PDF and Microsoft Word/Powerpoint, 30 minutes presentation time) for initial review and discussion with the Presidency, DHET and S2PYEI.
- **A final report** (executive summary, 25-35 pages including an executive summary/excluding annexes, using PYEI reporting template) and presentation (Microsoft Powerpoint, up to 1 hour presentation time, using PYEI presentation template). This will be presented first to the Presidency, DHET, and S2PYEI.
- **Two additional presentations on different dates to workstream members and other key stakeholders, using a virtual format.** The outputs will include recordings of all feedback meetings (MPEG/AVI or similar) and a summary documentation of feedback from all results presentations as a text file (PDF and Microsoft Word).

These outputs will be submitted until the end of the contract period and constitute the final deliverables.

Milestones/partial works	Deadline/place/person responsible	Criteria for acceptance
Inception report/Design of assessment	Within first 8 weeks of contract, Pretoria, by research lead	Inception report and tools accepted by PYEI and PMO
Implementation of assessment activities	Within first 5 months of contract. Pretoria, by research lead	Draft report findings desk study with recommendations and primary data collection plan accepted by S2PYEI and PMO
Preliminary reporting and discussion	Within 6 months of contract. Pretoria, by research lead	Preliminary report presented and accepted by S2PYEI and PMO
Final reporting and dissemination	Within 7 months of contract. Pretoria, by research lead	Final reports and presentations submitted, summary documentation of all dissemination and feedback meetings (recording, document)

Period of assignment: from 01 August 2023 until 15 February 2024.

3. Concept

As a tenderer you are required to show *how* the objectives defined in Chapter 2 (Tasks to be performed) will be achieved, if applicable under consideration of further method-related requirements (technical-methodological concept). In addition, the tenderer must describe the project management approach for service provision.

The numbers in parentheses in this section correspond to the lines of the technical assessment grid. Some lines are not referenced as they are not relevant for this tender. These items are weighted zero in the assessment grid and can be disregarded.

Please also respond to the commercial and technical eligibility requirements in the Eligibility Grid as part of your submission (also see section 7).

3.1. Technical-methodological design

Strategy

Please provide a critical examination of the task at hand, based on assessment objectives under 2 and outline the specific approach proposed to achieve these objectives. This should include a description of methods, a detailed overview of envisaged research activities and their scope, considerations on delivery and information on how ethical and quality standards for the study will be met **(1.1.1)**. Explain why the proposed approach is effective and efficient in delivering the service **(1.1.2)**.

Cooperation & Steering (1.2/1.3)

Present any actors (beyond the research team) relevant for the services you intend to involve and describe the **cooperation (1.2)** with them. Also explain the envisaged approach to **steering** the measures with the wider group of project partners, including workstream participants, key role players and other service providers **(1.3.1)**. The project management approach with GIZ/S2PYEI should be presented separately (see below)

Processes (1.4)

Departing from the milestones outlined above, describe the key **processes and main steps for the assessment**, e.g. by providing a **operational plan** or schedule **(1.4.1)** that describes how the services will be provided. Describe the necessary work steps and, if applicable, flag required **contributions** from other actors and how you will ensure that they can be sourced in a timely fashion **(1.4.2)**.

Learning and innovation (1.5)

Briefly describe steps that will be taken to assure that the assessment process and the dissemination of its findings will contribute to learning experiences among the partners and other key role players with an interest in the workstream model.

Project management of the contractor (1.6)

Please provide a brief overview of the proposed approach to project management, specifically regarding coordinating work with GIZ S2PYEI and the PMO and DHET **(1.6.1)**. Also include an overview of the different roles that key project members will assume in relation to general project management and the delivery of different work steps **(1.6.2)**.

Further requirements (1.7)

Not applicable.

0. Other Requirements

- Please submit your proposal (technical and price proposal) in separate files/folder to ZA_Quotation@giz.de no later than **23rd June 2023** all documents must be in PDF.
- Submission to any other email address may invalidate your bid.
- 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 **Euro**.
- 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.

Scientific data

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.**
- **Bids sent via Dropbox and WeTransfer will not be accepted.**

4. Personnel concept

Please provide a brief overview of the personnel concept. This should include detail on the main personnel to deliver the work (i.e. team leader and main expert). It is sufficient to briefly list any additional team members with a summary of their main qualifications and anticipated role. These will not be included in the technical assessment.

The tenderer is required to provide personnel who are suited to filling the positions described, assessment will be made on the basis of their CVs (see section 7 below). The specified qualifications represent the requirements to reach the maximum number of points in the technical assessment.

4.1 Team leader (assessment grid line 2.1)

Tasks of the team leader

- Overall responsibility for delivery of the work (design, quality and deadlines)
- Coordinating and ensuring communication with GIZ, partners and others involved in the project
- Regular reporting in accordance with deadlines

Qualifications of the team leader

- Education/training (2.1.1): advanced university degree (Masters or higher) in a relevant field of study (social sciences).
- Language (2.1.2): C2-level language proficiency in English
- General professional experience (2.1.3): 10 years of professional experience in designing and implementing research studies and assessments.
- Specific professional experience (2.1.4): Led 2 previous research projects on issues related to unemployment, labour market research, stakeholder coordination or skills development.
- Leadership/management experience (2.1.5): 3 years of management/leadership experience as project team leader or manager in a company.
- Regional experience (2.1.6): 5 years of experience in projects in the Southern African region, of which 3 years in projects in South Africa.
- Development cooperation (DC) experience (2.1.7): 3 years of experience in development cooperation or public sector/not-for-profit projects
- Other (2.1.8): Proficiency in research methods relevant to this tender (as per technical-methodological concept, please list 2).

4.2 Key Expert 1: Researcher (2.2)

Tasks of key expert 1

- Support or lead all or parts of the implementation of the assessment

Qualifications of key expert 1

- Education/training (2.2.1): advanced university degree (Masters or higher) in a relevant field of study (social sciences).
- Language (2.2.2): C2 -level language proficiency in English
- General professional experience (2.2.3): 7 years of professional experience in designing and implementing research studies and assessments.

- Specific professional experience (2.2.4): Contributed to 1 previous research project on issues related to unemployment, labour market research, stakeholder coordination, or skills development.
- Leadership/management experience (2.2.5): Not required
- Regional experience (2.2.6): 5 years of experience in projects in the Southern African region, of which 2 years in projects in South Africa.
- Development Cooperation (DC) experience (2.2.7): 3 years of experience in development cooperation or public sector projects
- Other (2.2.8): Proficiency in research methods relevant to this tender (as per technical-methodological concept, please list).

5. Costing requirements

The following basic calculations for the contract for works are a reference estimate for the expert days required, 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 ask you to offer your services at a lump sum price. Please allocate relevant portions of the total lump sum price to the milestones described below. The price per milestone must contain all relevant costs (professional fees, travel expenses, implementation costs associated with data collection, processing or analysis etc.). The price bid will be evaluated on the basis of the specified lump sum price.

In addition, the assessment of the financial bid is also based on the underlying daily rate. Please also provide the underlying daily rate for the key personnel listed above. A breakdown of days beyond allocation to milestones is not required.

Milestones/partial works		Estimated expert days (for orientation)	Deadline/place/person responsible
Inception/Design assessment	of	12 days	Within first 8 weeks of contract, Pretoria, by research lead
Implementation assessment activities	of	30 days	Within first 5 months of contract. Pretoria, by research lead
Preliminary reporting and discussion	and	5 days	Within 6 months of contract. Pretoria, by research lead
Final reporting and dissemination	and	10 days	Within 7 months of contract. Pretoria, by research lead

6. Inputs of GIZ or other actors

GIZ, the Presidency and DHET are expected to make the following available:

- Research reports and relevant documents required for desk review as well as in for implementation of primary data collection activities.
- Facilitate contact to potential research respondents and key informants.
- Participation in primary data collection activities, e.g. interviews, surveys.
- Convening of relevant participants for presentation of results at key stages of the process.
- PYEI reporting templates.

7. 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.

Please also consider any commercial and technical eligibility requirements listed in the Eligibility Assessment Grid (e.g. at least 3 recent reference projects, two of which in South Africa), and clearly present relevant information (client, date of delivery, type of project) within your submission.

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 be considered as references for previous work. However, key information on these references as required in the Eligibility Assessment Grid (e.g. project date, place, scope) need to be included in the submission itself.

The CVs of the personnel proposed in accordance with Chapter 0 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.

8. Outsourced processing of personal data

Personal data (e.g. from respondents) may be entrusted to or collected by the contractor in order to fulfil the contract. The contractor is obliged to protect this data under the standards of South Africa's Protection of Personal Information (POPI) Act and the European Union's General Data Protection Regulation (GDPR), in particular Articles 44-50. The contractor shall act as an independent data controller for the personal data that he processes in connection with the contract and shall comply with the applicable obligations under this data protection legislation.

In order to comply with data protection regulations, only aggregated and/or anonymized data will be submitted to GIZ.