

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

Development of online platform for JUST SA	Project number/ cost centre: 21.9003.1-001.00
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0. List of abbreviations

GTCC	General Terms and Conditions of Contract for supplying services and work 2022
BMWK	German Federal Ministry for Economic Affairs and Climate Action
CV	Curriculum Vitae
DC	Development Cooperation
DFFE	Department of Forestry, Fisheries and the Environment
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH
JUST SA	Just Transition to a Decarbonised Economy for South Africa
JT	Just Transition
IKI	International Climate Initiative
PR	Public Relations
PCC	Presidential Climate Commission
SMME	Small, Medium and Micro Enterprise
ToRs	Terms of reference
SSA	Sub Saharan Africa

1. Context

The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH is an international cooperation enterprise for sustainable development with worldwide operations. Its corporate objective is to improve people's living conditions on a sustainable basis.

The International Climate Initiative (IKI) is the key instrument of the German government, led by the Federal Ministry for Economic Affairs and Climate Action (BMWK) with cooperation of the Federal Ministry for Environment Nature Conservation, Nuclear Safety and Consumer Protection (BMUV), as well as the Federal Foreign Office (AA), for the international financing of climate change mitigation and biodiversity. Under the IKI, the German government is closely cooperating with the South African (SA) government, a core partner country. The Just Transition to a Decarbonised Economy for South Africa (JUST SA) project is funded by the IKI through the BMWK.

JUST SA supports the implementation of pathways towards a Just Transition towards an environmentally sustainable, climate-change resilient, low-carbon economy and just society. At the national level, the project supports the implementation of the Just Transition Framework, ensuring an inclusive and results-oriented process. At regional level, the project assists the Mpumalanga provincial government in formulating a concrete, sustainable and just green economy transition plan for a diversified regional economy, which covers skills pathway development and finance mechanisms. At the local level, the project implements the plan, pilots and scales up in selected municipalities of Mpumalanga and private sector action is incentivised. Furthermore, mine rehabilitation is addressed with a focus on mine water treatment through research, policy implementation and community engagement. Lessons learnt are fed back into the dialogue process.

Brief information on the project

Project components

JUST SA supports the implementation of the JUST Transition Framework, piloting measures in selected municipalities and especially providing regional and local support in Mpumalanga. JUST SA aims to address multiple challenges at once by creating new jobs in emerging economic sectors while raising awareness of climate change and biodiversity. Also, the project will promote equal opportunities for different gender groups and youth. The approach ensures that economic growth is balanced with social and environmental considerations, leading to a sustainable and green economy for all.

JUST SA makes an impactful contribution to the region of Mpumalanga and aims to replicate this in South Africa. Aiming for South Africa to become a role model for the world to follow.

To achieve considerable progress in the structural change to a decarbonized economy in South Africa (Impact), the envisioned **Outcome** of the project is that the implementation of alternative development pathways towards a Just Transition has been initiated. This requires on the one hand clear ideas and a broad acceptance of alternative, low-emission economic development models, and on the other hand tested approaches and business models that can be taken up at a broader scale.

Therefore, the project supports, in **Output I**, the elaboration of development pathways and financing mechanisms. The project also supports marginalized stakeholders to meaningfully

participate in the Just Transition process on all levels / spheres of government. The multilevel stakeholder process spreads knowledge and evidence, and the co-development of specific interventions and necessary financing mechanisms is an integral part. Both facilitates the uptake and implementation of low-carbon, inclusive economic activities.

In **Output II**, the aim is that concrete alternative development pathways for Mpumalanga are developed. In a strong partnership with the Mpumalanga Green Cluster Agency a green economy transition plan is developed and promoted. The focus also goes around making innovative instruments of green finance available and attracting new green investment in the region. In order to develop the human resources necessary for the implementation of low-carbon business models, a skills development strategy especially targeting youth and women is developed, focusing on career pathways and work-based learning. Next to financing and professional skills, knowledge on alternative business opportunities is an important precondition for the implementation.

In **Output III**, municipalities set up innovative Just Transition projects including access to finance, youth career pathways and knowledge sharing. The projects in 3-4 municipalities include transformational measures that are in line with the green economy transition plan in Mpumalanga. Local municipalities and district municipalities are capacitated and supported in developing Just Transition projects in line with the green economy transition plan. This will ensure that Innovative investment opportunities are promoted, aiming to benefit marginalized groups, especially youth and gender groups, as well as people with disabilities. Innovative funding instruments are built to support green Small, Medium and Micro Enterprise (SMMEs) in a gender responsive manner. Overall, the ecosystem for SMME support as well as access to finance for SMMEs are improved.

In **Output IV**, interventions are tested to improve water and soil quality as well as reduce land use risks in the selected areas thus creating long-term positive social and economic opportunities related to rehabilitation itself and on rehabilitated land.

Main actors and their roles

The project is based on a consortium with a strong local anchoring and a balanced range of actors engaging at different levels. The work is primarily done through local players which will benefit the stakeholder engagement and planning process. The JUST SA consortium members are GIZ, GreenCape, Trade & Industrial Policy Strategies (TIPS), Worldwide Fund for Nature- South Africa (WWF SA), National Business Institute (NBI), Yes4Youth and a close collaboration with the Mpumalanga Green Cluster Agency.

The political partner institution is the Department of Forestry, Fisheries and the Environment (DFFE). DFFE has the mandate for all climate matters and work carried out to enable a Just Transition. At the same time, it is intended to cooperate with additional implementing partners. Hence, other relevant stakeholders (e.g., other line departments such as the Department of Minerals Resource and Energy (DMRE), Department of Public Enterprise (DPE), the Presidency, the Presidential Climate Commission (PCC), South African Local Government Association (SALGA), Mpumalanga Office of the Premier, Mpumalanga Provincial

Government, and actors, ESKOM as a state-owned enterprise, private sector, research institutions, civil society) will be included in the project implementation.

Against this backdrop, an informing, representative online platform is important to give JUST SA activities visibility and to raise awareness among the target groups. To that end, GIZ is seeking to hire an IT service provider to develop and design a JUST SA online platform including a publication database, news channels and further digital offers. The service provider is expected to work closely with the JUST SA communication team, i.e. the communication specialist and the project unit coordinator. Additionally, the communication agency of JUST SA will contribute to the content development and content design and close cooperation is required.

2. Tasks to be performed by the contractor.

The primary objective is to create an information platform for the JUST SA project, allowing for seamless content management by the project team. The website needs to be secure, user-friendly, and hosted within Europe. The website should be built using a common CMS, such as Typo3, Wordpress or the like, enabling the project team to efficiently manage and update the content. The website must incorporate a Secure Socket Layer (SSL) protocol to ensure secure transactions and protect sensitive information. The website should be hosted on a server located in Europe, ensuring compliance with South African and European data protection regulations and providing good performance for users.

Main project deliverables:

- **A new information platform on the JUST SA project has been set up until 01 January 2024 (Service Package 1 – Implementation of a JUST SA Platform)**
- **General JUST SA solutions platform features & functions have been adjusted to reflect the requirements of the information platform and revised until 01 March 2024 (Service Package 2 – Platform features)**
- **Support services** for the management of the platform are provided for a period of 41 months **until 31 July 2027 (Service Package 3 – Platform support services)**¹

Service Package 1 – Implementation of a JUST SA Platform

Deadlines: (internal version: 01.12.2023 / final online version: 01.01.2024)

Input: up to 20 working days

- Conduct a virtual briefing with the project team and communication agency to clarify detailed objectives and tasks
- Specific platform requirements based on briefing and develop a first design

¹ There is an option to extend this work package by one year until the 31.07.2028, please refer to Option

- Discuss design with the project team and initiate the development of the JUST SA platform
- Conduct a responsive adaptation of the platform based on communication with the project team
- Test the platform functions and Q&A
- Present the final platform to the project team and communication agency during a virtual debriefing

Service Package 2 – Platform features

Deadlines: (01.03.2024)

Input: up to 20 working days

- Conduct a virtual briefing with the project team and communication agency to clarify detailed objectives of features
- Integrate a thematically structured database for publications and reports
- Integrate search functions on the website and the database
- Develop a news channel for JUST SA news articles and references to other defined (partner) news sources
- Develop an information room for detailed business development support
- Develop additional solutions based on potential changes of requirements
- Test the additional features and Q&A
- Present the final features to the project team and communication agency during a virtual debriefing

Service Package 3 – Provide support services for the management of the platform

Deadlines: 30.06.2027

Input: up to 40 working days

- Provide a direct contact person (IT expert) to the project team for support services
- Provide 2nd and 3rd level support services covering the following:
 - Quality check and maintenance of the JUST SA Platform
 - Quality check and maintenance of the general content management system of JUST SA
 - troubleshooting and solving of malfunctions
 - conducting regular system checks and tests
 - conduct smaller developments (design, concept modification, etc.)

The contractor will be responsible for delivering the following by the end of the contract period:

- **Website Development:** A fully functional, user-friendly website developed using a selected CMS (Typo3, Wordpress or similar).
- **SSL Certificate Integration:** The website should be secured using an SSL certificate to protect user data and information.
- **Website Hosting:** The contractor will arrange hosting for the website on a server located in Europe, ensuring fast loading times and compliance with data protection standards.

• **Maintenance and Support:** Regular technical support, website updates, and maintenance throughout the duration of the contract.

- The contractor provides equipment and supplies (consumables) and assumes the associated operating and administrative costs.
- The contractor manages costs and expenditures, time sheets, accounting processes and invoicing in line with the requirements of GIZ.
The contractor reports regularly to GIZ in accordance with the current AVB 2022 of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH.

In addition to the reports required by GIZ in accordance with the GTCC 2022, the contractor submits the following reports:

- Inception report
- Brief quarterly or half-yearly reports on the implementation status of the project

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

Milestones/process steps/partial services	Deadline
Implementation of JUST SA platform	15.01.2024
Finalization of platform features	01.03.2024
Ongoing platform management concluded	30.06.2027 ²

Period of assignment: from 01.11.2023 until 30.06.2027.

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).

² Option to extend this period to 31.07.2028

The tenderer is required to present the actors relevant for the services for which it is responsible and describe the **cooperation (1.2)** with them.

The tenderer is required to present and explain its approach to **steering** the measures with the project partners (1.3.1) and its contribution to the **results-based monitoring system** (1.3.2).

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. In particular, the tenderer is required to describe the necessary work steps and, if applicable, take account of the milestones and **contributions** of other actors (partner contributions) in accordance with Chapter 2 (Tasks to be performed) (1.4.2).

The tenderer is required to describe its contribution to knowledge management for the partner (1.5.1) and GIZ and to promote scaling-up effects (1.5.2) under **learning and innovation**.

4. Personnel concept

The tenderer is required to provide personnel who are suited to filling the positions described, on the basis of their CVs, the range of tasks involved and the required qualifications.

The below specified qualifications represent the requirements to reach the maximum number of points in the technical assessment.

Team leader

Tasks of the team leader

- 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
- Website development and development support
- Regular reporting in accordance with deadlines

Qualifications of the team leader

- Education/training (2.1.1): university degree (Master) in information technology, web design or similar
- Language (2.1.2): C2-level language proficiency in English
- General professional experience (2.1.3): 15 years of professional experience in the IT sector
- Specific professional experience (2.1.4): 10 years professional experience in web 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): 3 years of experience in projects in sub-sahara Africa of which 2 years in projects in South Africa
- Development cooperation (DC) experience (2.1.7): 1 years of experience in DC projects

- Other (2.1.8): N/A

Key expert 1

Tasks of key expert 1

- Development of information platform
- Development of platform features and testing
- Ongoing management of platform and stand by for changes or requests

Qualifications of key expert 1

- Education/training (2.2.1): university degree (Master) in information technology, web design or similar
- Language (2.2.2): C2 -level language proficiency in English
- General professional experience (2.2.3): 10 years of professional experience in the IT sector
- Specific professional experience (2.2.4): 5 years of professional experience in web development
- Leadership/management experience (2.2.5): N/A
- Regional experience (2.2.6): 2 years of experience in projects in SSA
- Development Cooperation (DC) experience (2.2.7): N/A
- Other (2.2.8): N/A

Soft skills of team members

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

- Team skills
- Initiative
- Communication skills
- Socio-cultural skills
- Efficient, partner- and client-focused working methods
- Interdisciplinary thinking

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 (CO₂ 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 CO₂ efficiency. For short distances, travel by train (second class) or e-mobility should be the preferred option.

If they cannot be avoided, CO₂ 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.

Specification of inputs

Fee days	Number of experts	Number of days per expert	Total	Comments
Designation of TL	1	30	30	
Designation of key expert	1	50	50	
Travel expenses	Quantity	Price	Total	Comments
Per-diem allowance in country of assignment	N/A			
Overnight allowance in country of assignment	N/A			
Transport	Quantity	Price	Total	Comments
International flights	N/A			Travel to the place of service delivery
<i>Domestic flights</i>	N/A			Flights within the country of assignment during service delivery
CO ₂ compensation for air travel				A budget is earmarked for settling carbon offsets against evidence.
<i>Travel expenses (train, car)</i>				Travel within the country of assignment, transfer to/from airport etc.
Other travel expenses •				e.g. visa costs
Other costs	Number	Price	Total	Comments

Flexible remuneration	1	5000	5000	A budget of EUR 5000 is foreseen for flexible remuneration. Please incorporate this budget into the price schedule. Use of the flexible remuneration item requires prior written approval from GIZ.
Fee days	Number of experts	Number of days per expert	Total	Comments
<i>Designation of TL</i>	1	30	30	
<i>Designation of key expert</i>	1	50	50	
Travel expenses	Quantity	Price	Total	Comments
<i>Per-diem allowance in country of assignment</i>	N/A			
<i>Overnight allowance in country of assignment</i>	N/A			
Transport	Quantity	Price	Total	Comments

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.

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.

Please calculate your financial tender based exactly on the parameters specified in Chapter 5 Quantitative requirements. The contractor is not contractually entitled to use up the days, trips, workshops or budgets in full. The number of days, trips and workshops and the budgets will be contractually agreed as maximum limits. The specifications for pricing are defined in the price schedule.

7. Option

After the services put out to tender have been completed, important elements of these tasks can be continued or extended. Specifically:

Type and scope

The contractor is responsible for providing the following optional services:

- **Support services** for the management of the platform are provided for a period of 12 months **until 31 July 2028 (Service Package 3 – Platform support services)**³

Service Package 3 – Provide support services for the management of the platform

Deadlines: 31.07.2028

Input: up to 12 working days

- Provide a direct contact person (IT expert) to the project team for support services
- Provide 2nd and 3rd level support services covering the following:
- Quality check and maintenance of the JUST SA Platform
- Quality check and maintenance of the general content management system of JUST SA
- troubleshooting and solving of malfunctions
- conducting regular system checks and tests
- conduct smaller developments (design, concept modification, etc.)

Requirements

Exercising the option will depend on commissioning of follow-on phase by GIZs commissioning party. The decision on continuation is expected to be made in the period 2025.

The option will be exercised by means of a contract extension on the basis of the individual approaches already offered.

Quantitative requirements for the optional services

Fee days	Number of experts	Number of days per expert	Total	Comments
Designation of TL	1	2	2	
Designation of key expert	1	8	8	

³ There is an option to extend this work package by one year until the 31.08.2028, please refer to Option

Fee days	Number of experts	Number of days per expert	Total	Comments
Travel expenses	Quantity	Price	Total	Comments
Per-diem allowance in country of assignment	N/A			
Overnight allowance in country of assignment	N/A			
Transport	Quantity	Price	Total	Comments
International flights	N/A			Travel to the place of service delivery
Domestic flights	N/A			Flights within the country of assignment during service delivery
Carbon offsets for flights	N/A			A budget is earmarked for settling carbon offsets against evidence.
Travel expenses (train, car) • •	N/A			Travel within the country of assignment, shuttle to/from airport etc.
Other travel expenses	N/A			e.g. visa costs
Other costs	Quantity	Price	Total	Comments
Flexible remuneration	N/A			A budget of EUR is earmarked for flexible remuneration. Please incorporate this budget into the price schedule. Use of the flexible remuneration item requires prior written approval from GIZ.
Workshops	N/A			The budget contains the following costs: .
Subcontracts	N/A			The budget contains the following costs: .
Procurement of materials and equipment	N/A			The budget contains the following costs: .
Local contributions	N/A			The contractor administers the following local <i>contributions</i> in

Fee days	Number of experts	Number of days per expert	Total	Comments
				accordance with Section 2.7 AVB:
Other costs	N/A			The budget contains the following costs:

Requirements on the format of the tender for the option

Please submit two price schedules: one price schedule for the main service and one price schedule for the main service and the option (main service + optional service). Please designate each one in the file name.

8. Other Requirements

- Please submit your proposal (technical and price proposal) in separate files/folder to ZA_Quotation@giz.de no later than **22th September 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 **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.

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.**