
Provision of Economic Policy Research Support to the National Planning Commission for a policy paper on the post-school education and training (Paper 3)

**Project number/
cost centre:**

14.3503.1-012

0. List of abbreviations

AVB	General Terms and Conditions of Contract (AVB) for supplying services and work 2018
BMZ	German Federal Ministry for Economic Cooperation and Development
DBE	Department for Basic Education
DHET	Department for Higher Education and Training
FET	Further Education and Training
GIZ	<i>Deutsche Gesellschaft für Internationale Zusammenarbeit</i>
GSP	Governance Support Programme
NDP	National Development Plan
NPC	National Planning Commission
PSET	Post School Education and Training
RDP	Reconstruction and Development Programme
SEF	Study- and Expert-Fund
SETA	Sector Education and Training Authorities
ToRs	Terms of reference

1. Context

The individual study and expert fund (SEF) measure “Support to the National Planning Commission (NPC) on the development of a series of economic policy research papers aimed at strengthening the achievement of Vision 2030”, is based on an agreement between the Governments of South Africa and Germany. It is a technical cooperation measure steered and implemented by the NPC and the *Deutsche Gesellschaft für Internationale Zusammenarbeit* (GIZ), the latter responsible for the implementation of the German development contributions on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ). The implementation of this SEF measure is supported by the Governance Support Programme II (GSP II).

This ToR forms part of the SEF agreement between the two governments.

South Africa is currently facing several challenges which hinder the country to prosper and the macro-economic status to improve. The National Development Plan (NDP) states that the society remains divided. This fact remains the biggest barrier currently and underlines the need for a unifying message that can pull the country around concrete and meaningful areas of common purpose to set it back on track. There are many areas where the country will struggle to find common purpose. But there are also areas where a common purpose would benefit most people.

The NPC was established to develop a long-term vision and strategic plan for South Africa. The Commission advises government on cross-cutting issues that influence the long-term development of South Africa. The main objective of the Commission is to rally the nation around a common set of objectives and priorities to drive development over the longer term. The mandate of the NPC is to take a broad, independent and critical view of South Africa by consulting with and drawing on the skills and expertise of multiple stakeholders, to build consensus and find concrete solutions to key challenges faced within the country.

The NPC is preparing a series of economic policy review papers which will contribute to its overall review of progress towards Vision 2030. The papers should offer well researched, evidence-based input into policy processes that have long-term economic, social and political implications for development. Through the SEF the German Government supports the NPC in the development of 6 of these policy papers, including: (1) Macro-Economy; (2) Industrial futures; (3) Post-School Education and Training (PSET); (4) Education and skills for the economy; (5) Infrastructure delivery and construction sector dynamism; and once the first five papers are elaborated the NPC will draw together top insights resulting there off into a flagship economy insight paper (6) achieving NDP 2030 economic vision.

The objective of the assignment is to produce a policy paper on PSET, for the economy and links to labour markets in South African, in support of the NPC’s review of progress towards the NDP’s Vision 2030.

The NPC views research into **education and skills, especially PSET, for the economy and their links to labour markets** as a critical component in its review of the NDP.

Important issue that should be taken account of are:

- The new student funding regime announced by the former President, which places heavy burdens on the fiscus
- The decision by the Department for Higher Education and Training (DHET) to cap Further Education and Training (FET) enrolment temporarily in order to deal first with the quality of FET programmes and outputs.
- The effectiveness of the Sector Education and Training Authorities (SETA) and the use of the Skill Levy has continued to be questioned, as it was in the Reconstruction and Development Programme (RDP).
- DHET 's indecision about the role of Community Colleges as an effective second-chance form of education that addresses labour market needs as well as needs of the potential students in such colleges

This paper will focus on priorities in basic, vocational and higher education in supporting the NDP' s economic vision. The paper will offer scenarios to link education outcomes with poverty, inequality and growth objectives. It will propose what is required to achieve those outcomes, inter alia in terms of finance, resources, institutional capability, and effective monitoring. The paper will, also, include thinking on human resource planning and migration.

A group of top experts and policy makers (from Department for Basic Education (DBE) and DHET) has already been convened to engage with the direction and approach that this paper will take and should be used as reference.

The above is to be considered for the policy paper. The researchers are invited to make recommendations on this approach.

2. Tasks to be performed by the contractor

This paper, largely a desk top study, should be a succinct analysis of the NDP vision 2030, what it proposed, its achievements, what it tried, possible gaps and recommendations for enhancing its short, medium and long-term impact. The emphasis of the paper will not only be on policy design but will also put emphasis on governance, accountability and execution.

The contractor is responsible for providing the following services:

- Conduct a desk top study and where applicable hold interviews with further subject matter experts to inform the policy paper
- Contribute to the final overview paper by provision of documents as well as meetings with the responsible service provider.
- Participation in meetings with a small selection of top experts and/or stakeholders arranged by the NPC.
- Once the paper is finalised and approved by the NPC for public comment, the NPC may arrange further public engagements.

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

Milestone	Deadline/place/person responsible
Inception meeting (Finalized research proposal - including research focus, questions and sample)	09 October 2019 – Pretoria

Presentation of preliminary analysis and findings (Draft 1- PowerPoint Presentation - Rough outline of the policy paper)	28 October 2019 - Pretoria
Discussion with EPP WG – Integration of feedback and recommendations (Draft 2 – including review and rewrites)	25 November 2019 - Pretoria
Presentation to NPC Economic Task Team (Final draft)	5 February 2020 – Pretoria
An executive summary/briefing note (format/length to be agreed)	18 February 2020 – Pretoria
Close out report	28 February 2020 - Pretoria

Period of assignment: From 09 October 2019 until 28 February 2020.

The paper should be a succinct analysis of the NDP vision 2030, what it proposed, its achievements, what it tried, possible gaps and recommendations for enhancing its short, medium and long-term impact. The emphasis of the paper will not only be on policy design but will also put emphasis on governance, accountability and execution.

The paper should be a succinct analysis of the NDP vision 2030, what it proposed, its achievements, what it tried, possible gaps and recommendations for enhancing its short, medium and long-term impact. The emphasis of the paper will not only be on policy design but will also put emphasis on governance, accountability and execution.

It should be structured as follows:

- What were the proposals and recommendations of the NDP?
- What progress has been achieved in terms of the implementation of the NDP?
- What needs to be done to ensure that goals and targets set are achieved by 2030? Is course correction needed?
- What are the existing gaps within the NDP?
- What recommendations in respect of institutions, accountabilities, performance, implementation and prioritisation?

It will be a maximum of about 25/30 pages plus tables and figures.

The project will be based in Pretoria and all meetings will be held at the offices of key parties – GIZ and the NPC. An attendance via skype4business is possible.

3. Concept

In the bid, the bidder is required to show how the objectives defined in Chapter 0 are to be achieved, if applicable under consideration of further specific method-related requirements (technical-methodological concept). In addition, the bidder must describe the project management system for service provision.

Technical-methodological concept

Strategy: 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). Following this, the bidder

presents and justifies the strategy with which it intends to provide the services for which it is responsible (see Chapter 0).

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 0 are to be provided. In particular, the bidder is required to describe the necessary work steps and, if applicable, take account of the milestones and contributions of other actors in accordance with Chapter 0.

Project management of the contractor

The bidder is required to explain its approach for coordination with the GIZ project.

- The contractor is responsible for selecting, preparing, training and steering the experts (international and national, short and long term) 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.

Project management, with occur within the Economic Policy Papers Working Group (EPP WG), comprised of NPC representatives, GIZ representatives and a project coordinator. Researcher(s) will report to and be accountable to this Working Group for any outputs. The EPP Working Group will approve the outputs of the researcher(s) and will be responsible for quality control.

In derogation from GIZ AVB, the contractor makes contributions to reports to GIZ's commissioning party instead of submitting its own reports.

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 allocation of work steps as set out in the schedule.

The bidder is required to describe its backstopping concept. The following services are part of the standard backstopping package, which (like ancillary personnel costs) must be factored into the fee schedules of the staff listed in the bid in accordance with section 5.4 of the AVB:

- Service-delivery control
- Managing adaptations to changing conditions
- Ensuring the flow of information between GIZ and field staff
- Contractor's responsibility for seconded personnel
- Process-oriented technical-conceptual steering of the consultancy inputs
- Securing the administrative conclusion of the project

- Ensuring compliance with reporting requirements
- Providing specialist support for the on-site team by staff at company headquarters
- Sharing the lessons learned by the contractor and leveraging the value of lessons learned on site

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

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, as well as planning and steering assignments and supporting local and international short-term experts
- Regular reporting in accordance with deadlines

Qualifications of the team leader

- Education/training (2.1.1): University qualification (Master or postgraduate) in Public Management, economics or other related social science
- Language (2.1.2): Very good business language skills in English
- General professional experience (2.1.3): 10 years of professional experience in the economic and education research sector
- Specific professional experience (2.1.4): 10 years' experience with the institutional context of PSET
- Leadership/management experience (2.1.5): 7 years of management/leadership experience as project team leader or senior researcher
- Regional experience (2.1.6): 10 years of experience in projects in South Africa
- Development Cooperation (DC) experience (2.1.7): n/a
- Other (2.1.8): Experience and in-depth knowledge working with national public institutions and stakeholders

Expert 1

Tasks of expert 1

- Conduction of qualitative- and quantitative research
- Analysis of PSET setting in South Africa
- NDP Review in light of post school education and training

Qualifications of expert 1

- Education/training (2.2.1): University Qualification (Bachelor/Master) in Economics, Public Finance or a Social Science (Education/Sociology)
- Language (2.2.2): Very good business language skills in English

- General professional experience (2.2.3): 10 years of professional experience in the economic and education research sector
- Specific professional experience (2.2.4): 10 years in qualitative and quantitative analysis of the institutional education sector
- Leadership/management experience (2.2.5): 2 years of experience in project management
- Regional experience (2.2.6): 10 years of experience in projects in South Africa
- Development Cooperation (DC) experience (2.2.7): n/a
- Other (2.2.8): Experience working with national public institutions and stakeholders

Soft skills of team members

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

- Team skills
- Initiative
- Communication skills
- Sociocultural competence
- Efficient, partner- and client-focused working methods
- Interdisciplinary thinking

Short-term expert pool with minimum 1, maximum 2 members

Tasks of the short-term expert pool

- Provide assistance to the analysis

Qualifications of the short-term expert pool

- Education/training (2.6.1): 1-2 experts with university qualification (Bachelor) in Economics or Social Sciences (Education/Sociology)
- Language (2.6.2): 1-2 experts with very good language skills in English
- General professional experience (2.6.3): 1-2 expert with at least 5 years of experience in the public education sector,
- Specific professional experience (2.6.4): 1-2 experts with at least 5 years of experience in qualitative and quantitative analysis
- Regional experience (2.6.5): 1-2 experts with at least 5 years of experience in South Africa
- Development Cooperation (DC) experience (2.6.6): n/a experts with at least 0 years of experience in DC
- Other (2.6.7): Experience working with national public institutions and stakeholders

The bidder must provide a clear overview of all proposed short-term experts and their individual qualifications.

5. Costing requirements

Assignment of personnel

Team leader: On-site assignment for 35 expert days combined for all experts.

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 0 and list the expenses

separately by daily allowance, accommodation expenses, flight costs and other travel expenses.

6. Inputs of GIZ or other actors

GIZ and NPC are expected to make the following available:

- Meeting logistics

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).

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. The CVs have to be submitted in English.

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.

- The cost for the delivery of this service – **Must be in a sealed separate envelope. Failure to put the budget for this measure in a sealed envelope will lead to your bid being disqualified.**

Please use the GIZ budget template provided for your quote. Please do not use your own budget template for this assignment.

Per diem cannot be claimed in full if breakfast and other meals are provided e.g. at workshops or meetings. This should be indicated if provided

Km's are reimbursed up to R3.60 per kilometre.